



# **FC STANDS Provider User Guide**

Version 1.0

Publishing Date: 10/20/2022

Document Control Information

Name	User Guide Document: FC STANDS Worker Portal User Guide
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Revision History

Version	Date	Additions/modifications	Prepared/revised by
1.0	10/20/2022	Initial	First Connections

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# 1 Introduction

## 1.1 Overview

The **AR DDS FC Stands Worker Portal** facilitates the referral and management of Developmental Disability Services (DDS) and First Connections services. This provides a one-stop-shop for DDS workers as they manage the intake process, case review, and referral to DHS systems.

## 1.2 Global Features

The **AR DDS FC Stands Worker Portal** has many global features that give the user a seamless, intuitive experience.

### 1.2.1. Global Menu

The Global Menu is at the top of the **AR DDS FC Stands Worker Portal** within the top banner bar. This allows the user to navigate to Screens from anywhere within the portal. Below is a screenshot of the Global Menu:



### 1.2.2. Accessibility

The **AR DDS FC Stands Worker Portal** shall ensure quality services and comply with the Americans with Disabilities Act of 1990.

### 1.2.3. Social Security Numbers

For security purposes, all data stored within our databases, including Social Security Numbers, and Dates of Birth are encrypted with 128-bit encryption to ensure that in the event a data breach is attempted, the data will be protected.



## 2 About This Guide

### 2.1 Who Should Use This Document?

This guide is intended for the following groups:

- DHS Users

### 2.2 Prerequisite Knowledge

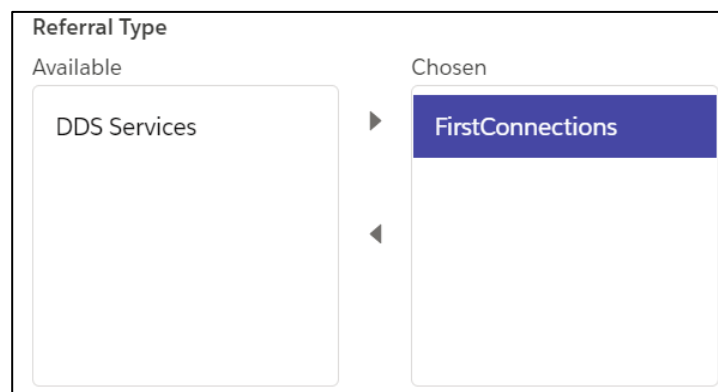
Using the **AR DDS FC Stands Worker Portal** and guide assumes that the user has the following prerequisite knowledge:

- Using a Tablet PC, Laptop, or standard desktop computer
- Internet connectivity with one of the following browsers:
  - Google Chrome
  - Edge

### 2.3 Common User Interface Elements

#### 2.3.1. Multi-select Box

A multi-select box allows the user to make one or multiple selections from a predetermined list of choices. To select an item, click the appropriate record to highlight it and click the appropriate arrow to move the record to the corresponding box. Items displayed in the right box have been chosen and the items in the left box are available.



#### 2.3.2. Dropdown Lists

A dropdown list allows the user to choose information from a predetermined list that “drops down” when activated. To select an item, move the mouse pointer to the appropriate item in the list and click it.





### 2.3.3. Text Boxes

Text boxes are used to record variable information, and may be either numeric or alpha-numeric, depending on the information being requested. To enter information, tab to or click into the text box and type in the data.

### 2.3.4. Table Filters

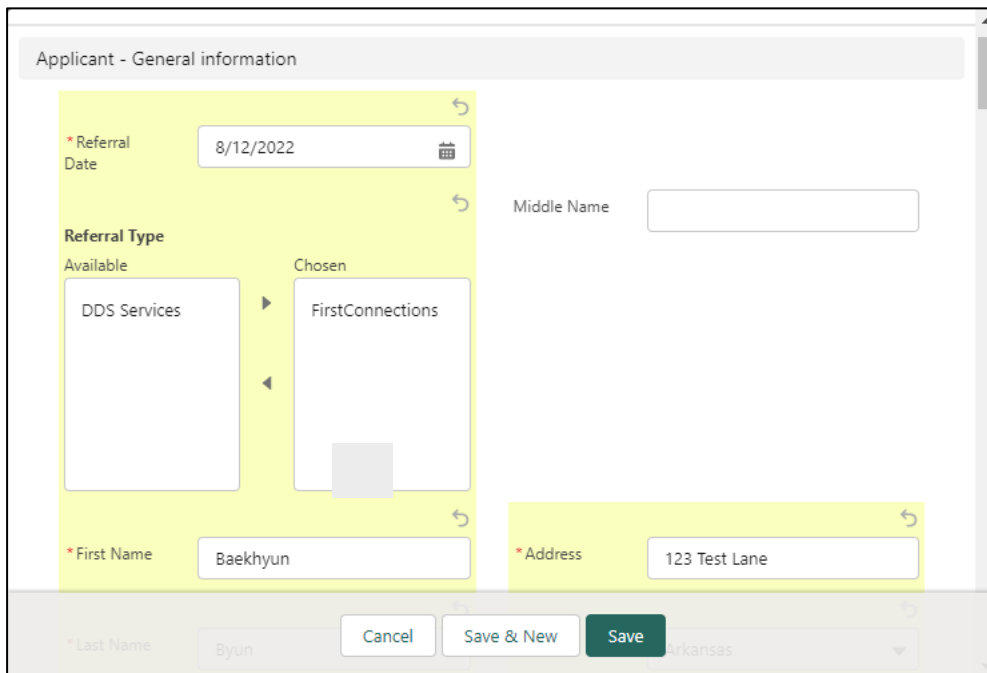
All tables on the **FC STANDS Referral Application** list view page have standard filtering and editing capabilities. Please note, some filters vary by user profile.

Select a List View		User should be able to select the desired view
Pin Current List View		User to be able to pin the current view as default view
Wrap or Clip Text		User to be able to wrap or clip text, by default one view is already selected
Search List		User to be able to search with filters or fields as search criteria
Display as Table		User to be able to select the display view as needed, default display view is 'Table'
Edit List		Inline edit is disabled. User to be able to edit or filter by one record type.

List view controls		User to be able to select one of options from the list of view controls and can save the view.
Refresh		Refreshes the whole page and displays the updated list of Facility records
Show charts		User to be able to select a chart from the charts list
Show filters		There is one facility filter by default. User to be able to add filters and remove them as needed

### 2.3.5. Required Fields

Required field text is indicated by the “\*” icon before the field name, which guides the user to enter data into the field.



### 2.3.6. Error Messages

Error messages serve as a prompt for the user to validate a field. Screenshot example of error message:

A screenshot of a web form with a yellow background. The form contains several input fields: First Name (Baekhyun), Last Name (Byun), Address (123 Test Lane), State (a dropdown menu showing "--None--"), County (Pulaski), and Mailing City (Little Rock). A red error message box is overlaid on the form, stating "We hit a snag." and listing the following fields to review: State, Gender, Does Applicant have insurance?, First Name, Last Name, and Phone Type. The State dropdown menu is highlighted with a red border, and the text "Complete this field." is visible below it. At the bottom of the form, there are buttons for "Cancel", "Save & New", and "Save".

### 2.3.7. Help Text

Help text is there to guide user on what a particular field requires. Screenshot of example roll-over help text:

A screenshot of a web form with a white background. The form contains a dropdown menu labeled "Has High school Certificate?" with the value "--None--". A blue help text box is overlaid on the dropdown menu, containing the text: "Has the applicant graduated from high school or Received a certificate of completion of high school?". To the right of the dropdown menu, there is a label "Referral C" and the text "Available".

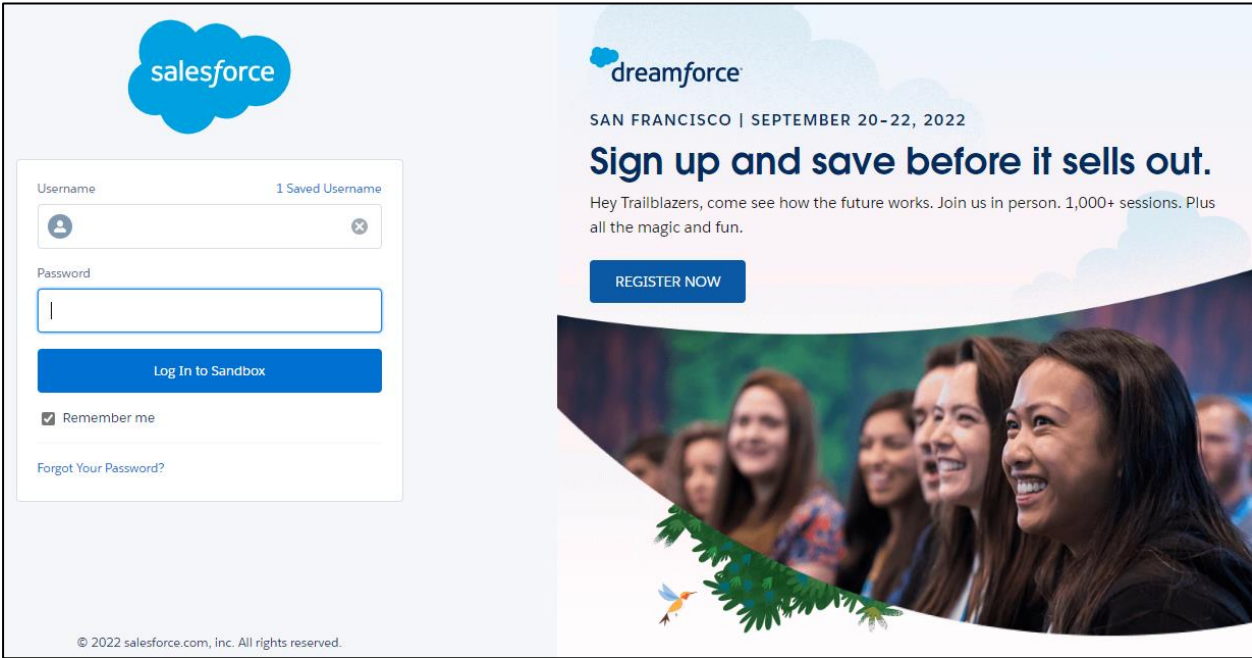
### 3 Login Page

#### 3.1 Overview

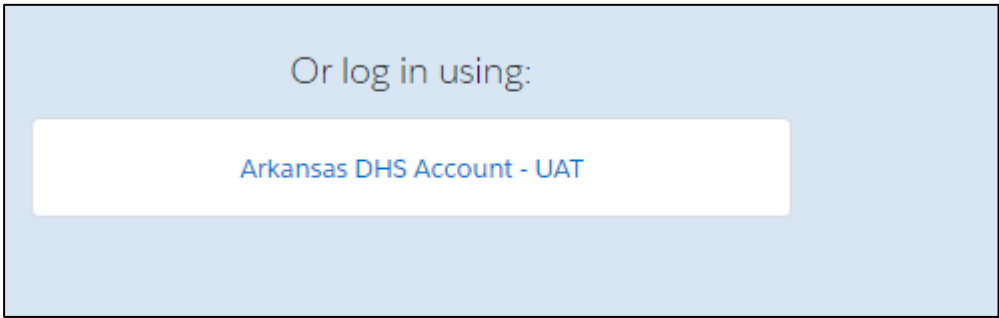
The Login Page is the landing page when the **AR DDS FC Stands Worker Portal** is accessed. This page can be reached by anyone who has the URL of the **AR DDS FC Stands Worker Portal** and has been provided access into the **AR DDS FC Stands Worker Portal**.

##### 3.1.1 Screenshot

To log into the **AR DDS FC Stands Worker Portal**, navigate to the login page:



Click the Arkansas DHS Account link to log in using single sign on feature.



##### 3.1.2 Controls & User Actions

The following table details the controls that are present on the Login Page. Each control includes a description and control type. Each user action includes a description.

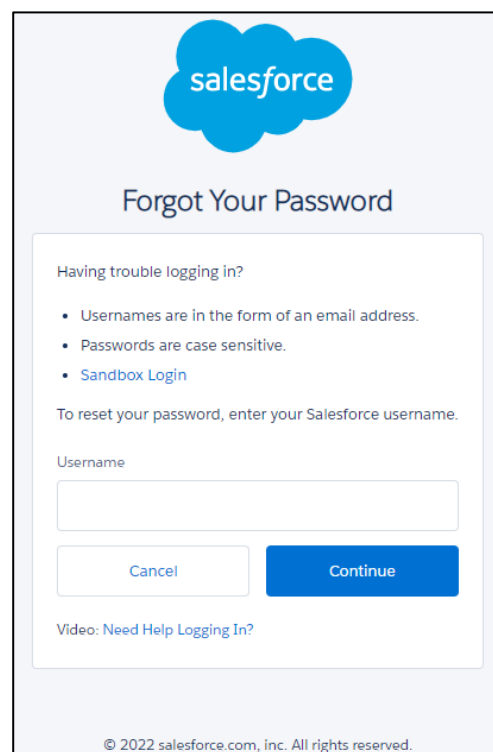
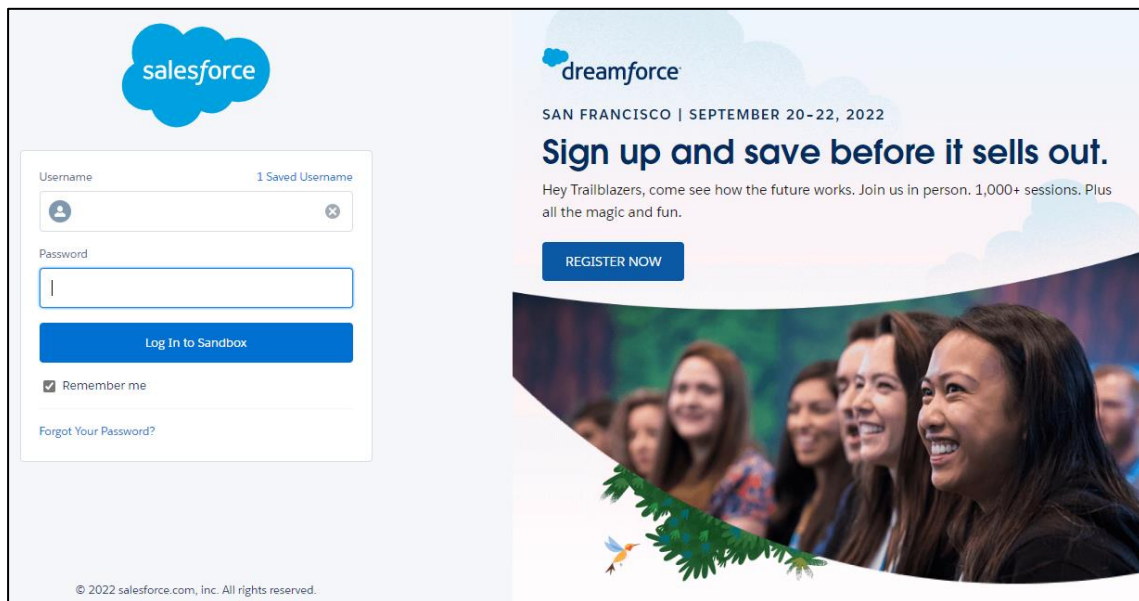
Controls	Description	Control Type
Username	User enters their username into this text box.	Mandatory
Password	User enters their password into this text box.	Mandatory
Login to Sandbox	Button that redirects the user to the Caseworker Dashboard Page.	N/A
Remember Me	Clicking this check box saves the Username.	Optional
Forgot Your Password?	Text hyperlink that redirects the user to the Password Reset Page.	Always enabled
Log in using Arkansas DHS Account	Clicking this button will redirect the user to the DHS login page.	Always enabled
Security Usage Disclaimer	Informational text for review.	Always enabled
User Action	Description	
Login	The user can log in by entering their username and password into the <b>Username</b> and <b>Password</b> text boxes and then clicking the <b>Log In</b> button. The user has the option of saving their username on their computer by clicking the <b>Remember Me</b> check box before clicking the <b>Log In</b> button.	

## 4 Forgot Password

### 4.1 Overview

The Forgot Password function can be found on the Login Page.

#### 4.1.1 Screenshot



#### 4.1.2 Controls & User Actions

The following table details the controls that are present on the Login Page. Each control includes a description, control type, and user action. Each user action includes a description.

Controls	Description	Control Type
Forgot your password?	Navigates the user to the Reset Password page.	Hyperlink
Username	Enter username in this textbox.	Always enabled
Cancel	Cancel the reset password function.	Always enabled
Continue	Submit reset password request.	Always enabled

User Action	Description
Reset Password	If the user forgets their password, the user can click the <b>Forgot Password</b> hyperlink, which will navigate them to the Reset Password page.



## 5 Home Page

### 5.1 Overview

The Home page is accessed when the user successfully accesses the **AR DDS FC Stands Worker Portal**. This page can only be reached by users who are active in the correct Active Directory FIM groups. When the user enters the URL, the application will verify the users FIM account eligibility and will redirect the user to the page.

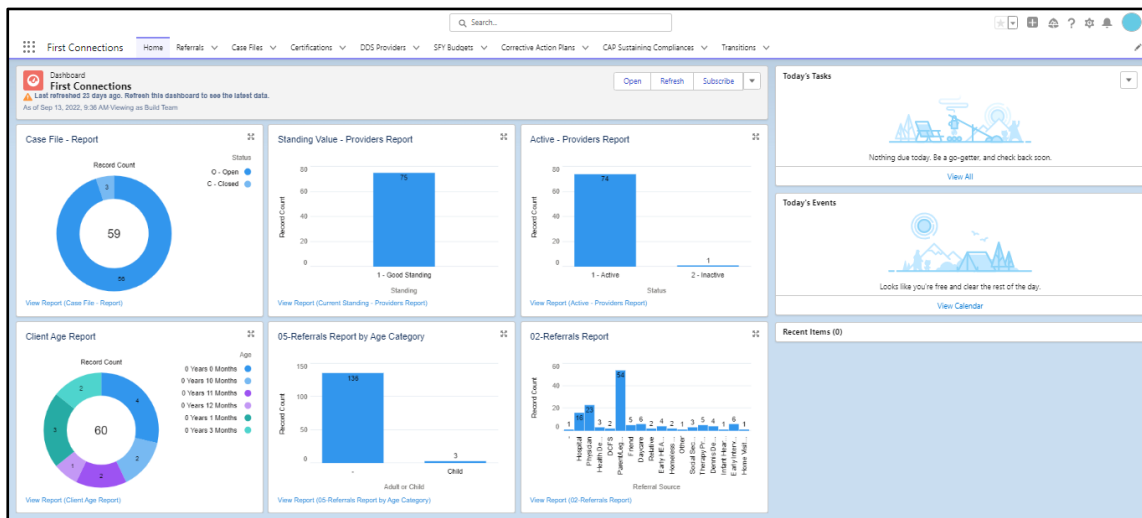
The Home page consists of the following navigation tabs:

- Home
- Referral
- Case Files
- DDS Providers
- SFY Budgets
- Corrective Action Plans
- CAP Sustaining Compliances
- Client, Family, and Other Contacts
- Transitions

The Home page consists of the following tiles:

- Quick Links
- Today's Tasks
- Today's Events
- Recent Items
- Case File-Report
- Standing Value-Providers Report
- Active-Providers Report
- Client Age Report
- 05-Referrals Report by Age Category
- 02-Referrals Report

#### 5.1.1 Screenshot



### 5.1.2 Controls & User Actions

The following table details the controls that are present on the DDS Home Page. Each control includes a description, control type and user actions. Each user action includes a description.

Controls	Description	Control Type
Quick Links	Text hyperlinks that redirect the user to the respective websites.	Always enabled
Today's Tasks	Quick view tasks assigned to the user.	Always enabled
Today's Events	Quick view of any scheduled events on the current day and a hyperlink to View Calendar.	Always enabled
Recent Items	Quick view of items recently viewed.	Always enabled
Case File-Report	Displays record count and status of cases.	Always enabled
Standing Value-Providers Report	Displays record count and standing status of Providers.	
Active-Providers Report	Displays record count and active or inactive status of Providers.	Always enabled
Client Age Report	Displays record count and age category of client.	Always enabled
05-Referrals Report by Age Category	Displays record count and referral by age category.	Always enabled
02-Referrrals Report	Displays record count and the referral source.	Always enabled
User Action	Description	
Open	Allows the tiles to open outside of the home page.	
Refresh	Allows the page to reload	
Subscribe	Allows editing of the frequency, day, and time.	

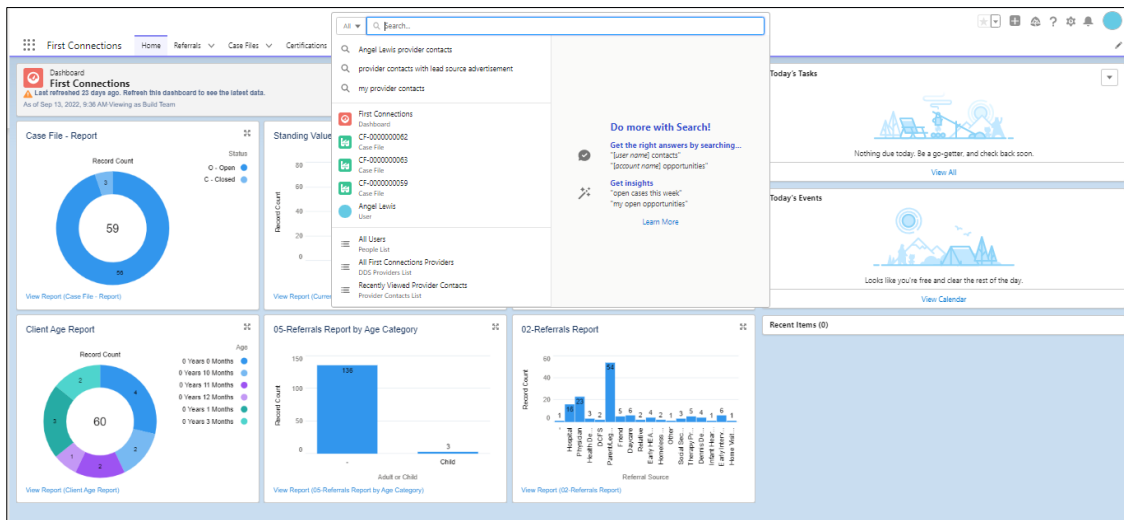
## 6 Search

### 6.1 Overview

The option to search the **AR DDS FC Stands Worker Portal** is displayed at the top of the page, globally throughout the portal. Users have the option to search all records or specify a filter to search for clients, referrals, users, etc. Once the search is entered, a Search Results page will be displayed.

#### 6.1.1 Screenshot

Search Bar:



Search Results:

The screenshot displays the search results page for the query "kids". The results are organized into two main sections: "DDS Providers" and "Provider Contacts".

**DDS Providers**

Provider Name	Provider ID	Home Office	DDS Non Medicaid	Tax Identification	Physical County	Physical Address	Physical Address	Last Modified	Last Modified Date
A1 Kids Room	P-0000000072	A1 Kids			Pulaski	Little Rock	Arkansas	lfarr	9/12/2022, 12:28 PM
A1 Kids	P-0000000071		123987456	789321654	Pulaski	Little Rock	Arkansas	lfarr	9/12/2022, 12:25 PM
Leap Kids Inc	P-0000000061	Leap Kids Inc			Pulaski	Little Rock	Arkansas	thunt	9/12/2022, 11:43 AM
Leap Kids Inc	P-0000000053		3568765421	123456789	Pulaski	Little Rock	Arkansas	thunt	9/12/2022, 11:29 AM
Quickly Fixed Kids	P-0000000050		453295685	123445678	Pulaski	Little Rock	Arkansas	cpark	9/12/2022, 11:27 AM

**Provider Contacts**

Name	Phone	Email	Client, Family and Other Contacts Owner Alias
Leap Kids Inc			thunt
A1 Kids Room			lfarr
Quickly Fixed Kids Site			cpark
Little Rock Kids Care, Inc.			thugh
Lavender Blue			tride

Don't see your result?  
We searched the objects you use most, but we didn't search everything.  
Know which object you're looking for? Select it in the dropdown menu to the search box, or in the sidebar.

### 6.1.2 Controls & User Actions

The following table details the controls that are present on the Search Tasks Page. Each control includes a description, control type, and user actions. Each user action includes a description.

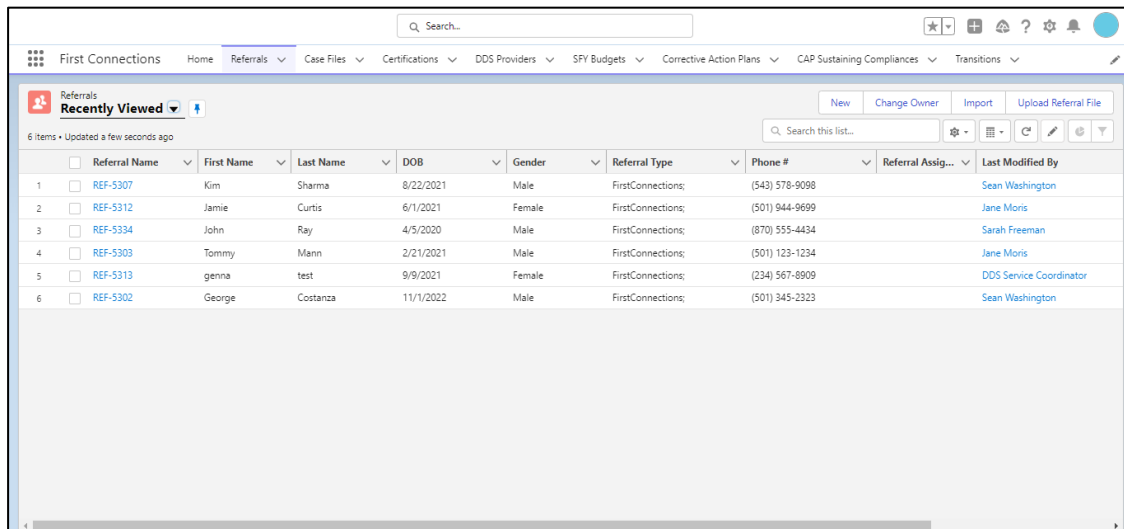
Controls	Description	Control Type
Search Bar	Dropdown list that filters the results by client, user, referral, etc. and a textbox where the user inputs the value of what is being searched.	Always enabled
Search Results	Based on the type of search, the applicable search results will display in a table-like view categorized by Referrals, People, Clients, etc.	Always enabled
User Action	Description	
Search	Search referrals, clients, people, tasks, etc. using the search bar.	
View Search Results	View search results in the Search Results Page and filter as desired.	

## 7 Referrals Page

### 7.1 Overview

The Referrals Page can be accessed by clicking the Referrals tab in the Top Navigation Bar. A list of all referrals can be found on this page. The user is also able to navigate to individual referral records via the Referrals Page.

#### 7.1.1 Screenshot





#### 7.1.2 Controls & User Actions

The following table details the controls that are present on the Referrals page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Edit List View	Dropdown list that displays several options the user can select to modify the selection of referrals viewed in the Referrals table.	Always enabled
New	Opens a pop-up box where users can create a brand-new referral.	Always enabled
Change Owner	Opens a pop-up box where the user can assign a selected referral to another <b>DDS Intake</b> user.	Conditionally enabled (based on user profile)
Referrals Table	Displays referral records and the corresponding client information.	Always enabled

User Action	Description
Navigation	Navigate to the Referrals Page by clicking on the Referrals tab in the global menu.

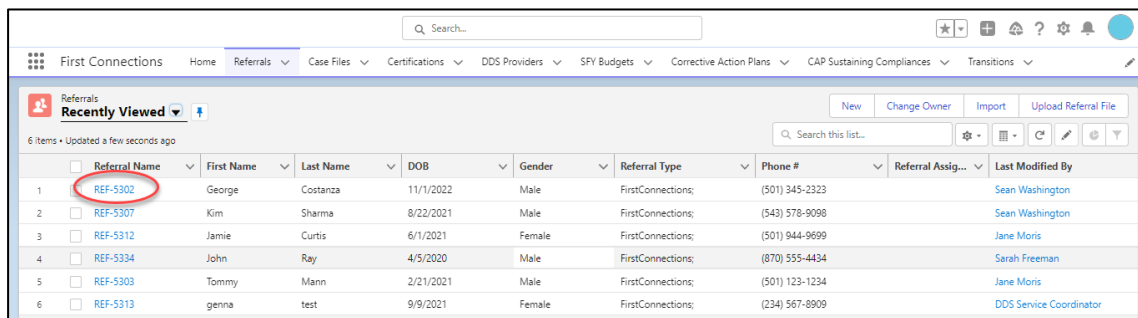
Select List View	<p>Click the  (right of 'Recently Viewed' in the screenshot) to open a dropdown list with the following options:</p> <ul style="list-style-type: none"> <li>- FCS OCR Referral Intake Queue</li> <li>- First Connections</li> <li>- My Referrals</li> <li>- Recently Viewed</li> </ul> <p>Select one of these options to display the corresponding referrals in the Referrals Table. Use the  button to make the selected view your default view.</p>
New	Click the "New" button to open a blank form to create a new referral.
Change Owner	Opens a pop-up box where the user can assign a selected referral to another <b>DDS Intake</b> user.
Upload Referral File	Click the hyperlink to navigate to Upload File (This field is relevant for OCR).
Referrals Table	Click the Referral Number to navigate to the corresponding Referral Details page.

## 8 Referral Details Page

### 8.1 Overview

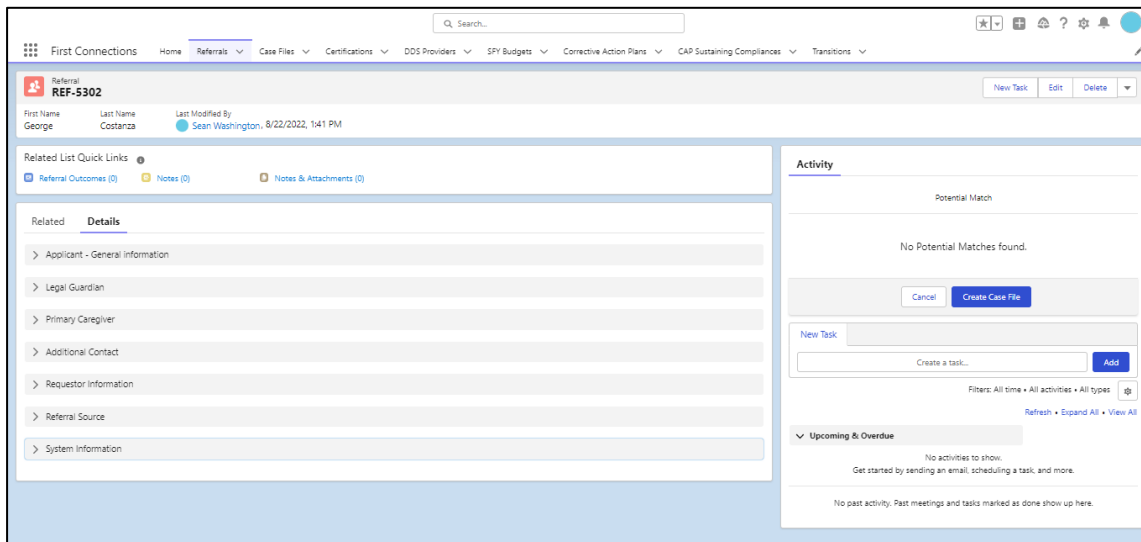
The Referral Details page can be accessed by clicking on the Referral Number on the Referral List view. The Referral Details page displays all fields that have been captured via the community portal entries from the public or setup by DDS Staff within the DDS First Connections system.

#### 8.1.1 Screenshot



	Referral Name	First Name	Last Name	DOB	Gender	Referral Type	Phone #	Referral Assign...	Last Modified By
1	<a href="#">REF-5302</a>	George	Costanza	11/1/2022	Male	FirstConnections;	(501) 345-2323		Sean Washington
2	<a href="#">REF-5307</a>	Kim	Sharma	8/22/2021	Male	FirstConnections;	(543) 578-9098		Sean Washington
3	<a href="#">REF-5312</a>	Jamie	Curtis	6/1/2021	Female	FirstConnections;	(501) 944-9699		Jane Moris
4	<a href="#">REF-5334</a>	John	Ray	4/5/2020	Male	FirstConnections;	(870) 555-4434		Sarah Freeman
5	<a href="#">REF-5303</a>	Tommy	Mann	2/21/2021	Male	FirstConnections;	(501) 123-1234		Jane Moris
6	<a href="#">REF-5313</a>	genna	test	9/9/2021	Female	FirstConnections;	(234) 567-8909		DDS Service Coordinator

#### Details sections collapsed:



Referral Details for REF-5302

First Name: George, Last Name: Costanza, Last Modified By: Sean Washington, 8/22/2022, 1:41 PM

Related List Quick Links: Referral Outcomes (0), Notes (0), Notes & Attachments (0)

Related Details:

- > Applicant - General information
- > Legal Guardian
- > Primary Caregiver
- > Additional Contact
- > Requestor Information
- > Referral Source
- > System Information

Activity:

Potential Match

No Potential Matches found.

Create Case File

New Task

Create a task...

Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

## Details Section – Generation Information Expanded:

**First Connections** Home Referrals Case Files Certifications DCS Providers SPY Budgets Corrective Action Plans CAP Sustaining Compliance Transitions

**Referral REF-5302** First Name: George Last Name: Costanza Last Modified By: Sean Washington, 8/22/2022, 1:41 PM

Related List Quick Links: Referral Outcomes (0) Notes (0) Notes & Attachments (0)

**Applicant - General Information**

Referral Date	8/15/2022	Mode Of Submission	
Referral Type	FirstConnections	Other Mode of Submission	
First Name	George	Client	
Last Name	Costanza	Middle Name	
City	Little Rock	Address	1 Festvus Cir
Zip Code	72206	Address Line 2	
Email Address		State	Arkansas
Mailing Address	1 Festvus Cir	County	Pulaski
Mailing State	Arkansas	Out of State	
Mailing County		Mailing Address Line 2	
Receiving Medicaid?	No	Mailing City	Little Rock
SSN		Mailing Zip Code	72206
Adult or Child		Medicaid ID	
Race	White	DOB	11/1/2022
Phone Type		Gender	Male
Alternate Phone Type		Ethnicity	Non-Hispanic/Latino
Does Applicant have insurance?	No	Phone #	
Has High school Certificate?		Alternate Phone #	
Does Applicant have a Primary Caregiver?		Is a Twin?	No
Is the individual part of a BASSET?		Behavioral Health Member?	
Reason for Request	Parent or Caregiver Concern	Ready for Transfer	
Diagnosis		Referral Check	CDS
Does Applicant have a Legal Guardian?		Other Applicable Reasons	
		Specify Other Diagnosis	
		Application ID	
		EMC ID	

**Activity**

Potential Match

No Potential Matches found.

[Cancel](#) [Create Case File](#)

**New Task**

Create a task...

[Add](#)

Filters: All time • All activities • All types

[Refresh](#) [Expand All](#) [View All](#)

**Upcoming & Overdue**

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

### 8.1.2 Controls & User Actions

The following table details the controls that are present on the Referral Details Page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Edit	Click to enable editing in the referral record.	Button
Printable View	Click to open the referral record in a printable format.	Button
Create Client	Click to open a pop-up window where users can input client information and save to create a new client.	Button
Refer to CDS	Click to send the referral to the DHS CDS system.	Button
Refer to Waiver APC	Click to send the referral to the DHS Waiver APC system.	Button
Referral Outcomes	Navigates the user to a referral outcomes table view.	Hyperlink
Notes	Navigates the user to a notes table view where historical case notes can be viewed, and new case notes can be created.	Hyperlink



Notes & Attachments	Navigates the user to a Notes & Attachments table view where previously uploaded documents can be viewed, and new documents can be uploaded.	Hyperlink
DHS Document Portal	Navigates the user to the external DHS Edoctus website.	Hyperlink
<b>Applicant – General Information Section</b>		
Request Date	Date selection the date the referral request was entered.	Always enabled
Referral Type	Displays the services that are being requested.	Always enabled
First Name	Displays the first name of the person needing services.	Mandatory
Middle Name	Displays the middle name of the person needing services.	Not Mandatory
Last Name	Displays the last name of the person needing services.	Mandatory
Address	Displays the applicant's street address.	Mandatory
City	Displays the applicant's city.	Mandatory
State	Displays the applicant's state.	Mandatory
Zip Code	Displays the applicant's zip code.	Mandatory
County	Displays the County in which the applicant's address resides.	Mandatory
Email Address	Displays the applicant's email address.	Mandatory
Out of State	Displays applicant's address is not in the state of Arkansas.	Not Mandatory
Receiving Medicaid?	Click the Drop-down to indicate whether the applicant is receiving Medicaid.	Not Mandatory
Medicaid ID	Displays the Medicaid number if the applicant is receiving Medicaid.	Not Mandatory
SSN	Displays the applicant's Social Security Number.	Not Mandatory
DOB	Displays the applicant's date of birth. Click the calendar icon to make date selection.	Mandatory
Adult or Child	Click the Drop-down indicate whether the applicant is an adult or a child.	Mandatory
Gender	Click the Drop-down to select the applicant's gender.	Mandatory
Race	Click the Drop-down to select the applicant's race.	Mandatory
Ethnicity	Click the Drop-down to select the applicant's ethnicity.	Mandatory
Phone Type	Click the Drop-down to indicate the applicant's type of phone.	Not Mandatory
Phone #	Displays the applicant's phone number.	Not Mandatory

Alternate Phone Type	Click the Drop-down to select type if an alternate phone number is available for the applicant.	Not Mandatory
Alternate Phone #	Displays the applicant's alternate phone number.	Not Mandatory
Does Applicant have insurance?	Click the Drop-down to indicate whether the applicant has insurance.	Mandatory
Is a twin?	Click the Drop-down to indicate whether the applicant is a twin.	Mandatory
Has high school certificate?	Click the Drop-down to indicate whether the applicant has received a high school certificate.	Not Mandatory
Does Applicant have a Primary Caregiver?	Click the Drop-down to indicates whether the applicant has a primary caregiver.	Not Mandatory
Behavioral Health Member?	Click the Drop-down to indicate whether the applicant is a behavioral health member.	Not Mandatory
Is the individual part of a PASSE?	Click the Drop-down to indicate whether the applicant is part of a PASSE.	Not Mandatory
Ready to transfer	Click the Drop-down to indicate the referral is ready to be transferred to CDS or WAPC	Not Mandatory
Reason for Request	Click the Drop-down to indicate the reason for which the applicant is requesting services.	Not Mandatory
Other Applicable Reasons	Displays the if 'Other' is selected in the Reason for Request menu, the reason for request is entered here.	Not Mandatory
Referral Check	Click and select from multi-select menu. If applicable, indicates the DHS system the referral will be sent to (i.e., CDS or Waiver APC).	Not Mandatory
Does Applicant have a Legal Guardian?	Click the Drop-down to indicate whether the applicant has a legal guardian.	Not Mandatory
Diagnosis	Click the Drop-down to select the applicant's diagnosis.	Not Mandatory
Specify Other Diagnosis	Displays the if 'Other' is selected in the Diagnosis menu, the diagnosis is entered here.	Not Mandatory
<b>Legal Guardian Section</b>		
Primary Caregiver?	Click the Drop-down to indicate whether the applicant's legal guardian is their primary caregiver.	Mandatory
Guardian Type	Click the Drop-down to indicate the applicant's type of legal guardian.	Not Mandatory
Relationship	Click the Drop-down to select Yes/No.	Not Mandatory
Relationship Type	Displays the Legal guardian's relationship with the applicant.	Not Mandatory
First Name	Displays the Legal guardian's first name.	Mandatory
Middle Name	Displays the Legal guardian's middle name.	Not Mandatory

Last Name	Displays the Legal guardian's last name.	Mandatory
Legal Status	Click the Drop-down to indicate the status of the applicant's legal guardianship.	Not Mandatory
Address same as Applicant?	Click the Drop-down to indicate whether the legal guardian's address is the same as the applicants.	Not Mandatory
Address	Displays the Legal guardian's address.	Mandatory
City	Displays the Legal guardian's city.	Mandatory
State	Click the Drop-down menu to select Legal guardian's state. Arkansas is the default state.	Mandatory
Zip Code	Displays the Legal guardian's zip code.	Mandatory
County	Click the Drop-down to select Legal guardian's county.	Mandatory
Out of State	Check the checkbox if the legal guardian's address is not in the state of Arkansas.	Not Mandatory
Phone Type	Click the Drop-down to indicate the type of the legal guardian's phone.	Not Mandatory
Phone #	Displays the Legal guardian's phone number.	Mandatory
Ext	Displays the phone number extension number if applicable.	Not Mandatory
Fax	Displays the Legal guardian's fax number.	Not Mandatory
Email Address	Displays the Legal guardian's email address.	Not Mandatory
<b>Primary Caregiver Section</b>		
First Name	Displays the applicant's primary caregiver first name.	Not Mandatory
Middle Name	Displays the Primary caregiver's middle name.	Not Mandatory
Last Name	Displays the Primary caregiver's last name.	Not Mandatory
Address same as Applicant?	Click the Drop-down to indicate whether the primary caregiver's address is the same as the applicants.	Not Mandatory
Address	Displays the Primary caregiver's address.	Not Mandatory
City	Displays the Primary caregiver's city.	Not Mandatory
State	Click the Drop-down to select Primary caregiver's state.	Not Mandatory
Zip Code	Displays the Primary caregiver's zip code.	Not Mandatory
County	Click the Drop-down to select the county in which the primary caregiver's address resides.	Not Mandatory
Out of State	Check the checkbox if the legal guardian's address is not in the state of Arkansas.	Not Mandatory
Phone Type	Click the Drop-down to indicate the primary caregiver's type of phone.	Not Mandatory
Phone #	Displays the Primary caregiver's phone number.	Not Mandatory

Ext	Displays the phone number extension number if applicable.	Not Mandatory
Fax	Displays the Primary caregiver's fax number.	Not Mandatory
Email Address	Displays the Primary caregiver's email address.	Not Mandatory
<b>Additional Contact Section</b>		
Is there an additional contact person?	Click the Drop-down to indicate whether the applicant has an additional contact person.	Conditionally Mandatory
First Name	Displays the Additional contact's first name.	Conditionally Mandatory
Middle Name	Displays the Additional contact's middle name.	Conditionally Mandatory
Last Name	Displays the Additional contact's last name.	Conditionally Mandatory
Address	Displays the Additional contact's address.	Conditionally Mandatory
City	Displays the Additional contact's city.	Conditionally Mandatory
State	Click the Drop-down to select Additional Contact's state.	Conditionally Mandatory
Zip Code	Displays the Additional contact's zip code.	Conditionally Mandatory
County	Click the Drop-down to select County in which the additional contact's address resides.	Conditionally Mandatory
Out of State	Check the checkbox if the legal guardian's address is not in the state of Arkansas.	Conditionally Mandatory
Email Address	Displays the Additional contact's email address.	Conditionally Mandatory
Phone Type	Click the Drop-down to indicate the additional contact's type of phone.	Conditionally Mandatory
Phone #	Displays the Additional contact's phone number.	Conditionally Mandatory
Ext	Displays the phone number extension number if applicable.	Conditionally Mandatory
<b>Requestor Information Section</b>		
First Name	Displays the Requestor's first name.	Not Mandatory
Middle Name	Displays the Requestor's middle name.	Not Mandatory
Last Name	Displays the Requestor's last name.	Not Mandatory
Email Address	Displays the Requestor's email address.	Not Mandatory
Phone Type	Click the Drop-down to indicate the additional contact's type of phone.	Not Mandatory

Phone #	Displays the Requestor's phone number.	Not Mandatory
Ext	Displays the phone number extension number if applicable.	Not Mandatory
<b>Referral Source Section</b>		
Referral Source	Displays the documented Referral Source.	Mandatory
Priority Source	Click the Drop-down to indicate the priority source of the referral.	Not Mandatory
Referral Source – Other Option Explain	Displays if 'Other' is selected as the referral source, the referral source is entered here.	Not Mandatory
EIDT Enrollment Status	Click the Drop-down to indicate the applicant's Early Intervention Day Treatment application status.	Conditionally Mandatory
Received First Connections Handout?	Click the Drop-down to indicates whether the applicant has received the first connections handout.	Conditionally Mandatory
Owner	This is system generated and displays the <b>DDS Intake</b> System user to whom the referral is currently assigned.	System-Generated
<b>System Information Section</b>		
Transferred to CDS By	This is system generated if applicable; this field displays the <b>DDS Intake</b> System user who transferred the referral to the CDS system.	Read Only
Transferred to Waiver APC By	This is system generated if applicable; this field displays the <b>DDS Intake</b> System user who sent the referral to the Waiver APC system.	Read Only
Transferred to CDS Date/Time	This is system generated if applicable; this field displays the date and time the referral was sent to the CDS system.	Read Only
Transferred to Waiver APC Date/Time	This is system generated if applicable; this field displays the date and time the referral was sent to the Waiver APC system.	Read Only
CDS Referral ID	This field is System-generated.	Read Only
Waiver Case ID	This field is System-generated.	Read Only
Created By	This field is System-generated.	Read Only
Last Modified By	Text displays the name, date, and time of the user who last modified the client record.	Read Only
<b>User Action</b>	<b>Description</b>	
Cancel	This button deletes any changes made to the referral Record and closes the Edit view of the record.	
Save	This button saves any changes made to the referral record and closed the Edit view of the record.	

## 9 Case Files

### 9.1 Overview

The Case File Page displays all cases associated to a referral. Details such as referral status and application status can be found here. Additionally, the user can navigate to view outcome details in the Meeting Setup and Outcome section in the related links for more information.

#### 9.1.1 Screenshot

Case File ID	Client	Status	Open Date	Close Date	Case Closure Reason	Service Coordinator	Eligibility D.	Last Modified By	Last Modified Date
1	CF-0000000000	Kim Sharma	O - Open	8/22/2022				DDS Admin	8/22/2022 5:32 PM
2	CF-0000000001	Tommy Mann	O - Open	8/22/2022		Patty Jones		Sean Washington	8/29/2022 2:17 PM
3	CF-0000000002	Michael Knight	O - Open	8/22/2022		William Archer	8/23/2022	William Archer	8/24/2022 9:20 AM
4	CF-0000000003	sara park	O - Open	8/23/2022		William Archer		William Archer	8/24/2022 8:18 AM
5	CF-0000000004	Jamie Curtis	O - Open	8/23/2022		Patty Jones		Jane Morris	8/23/2022 1:02 PM
6	CF-0000000005	TOMMY HILFGER	O - Open	8/23/2022		Patty Jones	8/23/2022	Aprona Agamall	8/24/2022 9:00 AM
7	CF-0000000006	Jerry Seinfeld	C - Closed	8/24/2022	8/24/2022	Moved out of state		William Archer	8/24/2022 8:09 AM
8	CF-0000000007	henna lee	O - Open	8/23/2022		Kannan Sundarajan		DDS Admin	8/24/2022 7:38 AM
9	CF-0000000008	gemma test	O - Open	8/23/2022		DDS Service Coordinator		DDS Service Coordinator	8/23/2022 2:04 PM
10	CF-0000000009	Marcia Brady	O - Open	8/24/2022				William Archer	8/24/2022 10:31 AM

#### 9.1.2 Controls & User Actions

The following table details the controls that are present on the Case Files Page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Case Files</b>	The table displays all cases and details associated with the case.	Always enabled
List View Table	<p>The table displays the list of cases in the AR <b>DDS First Connections Worker Portal</b> and their following information:</p> <ul style="list-style-type: none"> <li>- Case File ID</li> <li>- Client Name</li> <li>- Status</li> <li>- Open Date</li> <li>- Close Date</li> <li>- Case Closure Reason</li> <li>- Service Coordinator</li> <li>- Eligibility Determination Date</li> <li>- Last Modified By</li> <li>- Last Modified Date</li> </ul>	Always enabled
<b>User Action</b>	<b>Description</b>	
Search	Click in the textbox to search for case.	
List View Controls	Click button to list view controls.	
Display as Table	Click to change display table view.	

Refresh	Click to refresh page
Edit List	Click to edit case list.
Show Chart	Click to show chart
Filter	Click to filter list.
Printable view	Click to print list view page.

## 10 Case File Details Page

### 10.1 Overview

The Case File Page displays detailed information about outcomes and any associated information in determining the outcome.

#### 10.1.1 Screenshot

The screenshot shows the 'Case File' page for 'Michael Knight'. The page is divided into several sections: 'Case File ID' (CF-000000002), 'Status' (O - Open), 'Open Date' (8/22/2022), 'Stage' (Family Engagement Completed), 'Service Coordinator' (William Archer), 'Client Information / Eligibility' (Client: Michael Knight, Eligibility Determined: Yes, Eligibility Determination: 1 - Part C Eligible (DC)), 'Closure Details' (Case Closure Reason, Close Date), 'System Information' (Created By: Sean Washington, Last Modified By: William Archer), 'Attachments' (table with columns: Attachment Id, Title, Attachment Type, Attachment Description, Last Modified Date, Last Modified By), 'Meeting Setup and Outcomes (2)' (list of meetings with details like Record Type, Scheduled Meeting Date, Actual Meeting Date), 'Assignments (3+)' (list of assignments with details like Service Coordinator, Provider User Name, Provider User), and 'Client, Family and Other Contacts (2)' (list of contacts with details like Name, Phone).

#### 10.1.2 Controls & User Actions

The following table details the controls that are present on the Case File Details Page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Case File Header</b>		
Case File ID	Displays the Case File Referral ID.	System-Generated
Status	Click the dropdown to select the status	Mandatory
Client	Displays the name of the client.	System-Generated
Open Date	Displays the date case file is opened.	System-Generated
Eligibility Determined	Click dropdown to make selection.	Not Mandatory
Eligibility Determination Date	Displays the date decision was made about a client's eligibility.	Not Mandatory
Eligibility Determination	Displays determination of client's eligibility.	Not Mandatory



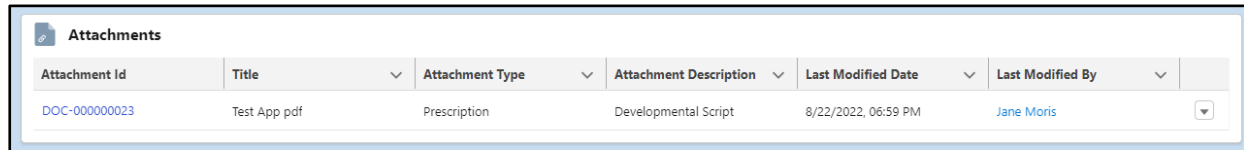
Service Coordinator	Displays the name of the Service Coordinator.	Mandatory
Clinical Opinion	Displays the clinical opinion.	Not Mandatory
Stage	Displays the case file's current state.	System-Generated
Close Date	Displays the date the case file was closed.	Not Mandatory
Case Closure Reason	Displays the reason the case file was closed.	Conditionally Mandatory
Legacy Record ID	Displays if record is converted from legacy system.	System-Generated
<b>System Information</b>		
Created By	Displays the name, date, and time of the user who created the outcome record.	System-Generated
Last Modified By	Displays the name, date, and time of the user who last modified the outcome record.	System-Generated
<b>User Action</b>	<b>Description</b>	
Edit	Click button to edit case file details.	Always Enabled
Cancel	Click button to delete any changes made to the case file record and close the Edit view of the record.	Always Enabled
Save	Click button to save any changes made to the case file record and close the Edit view of the record.	Always Enabled

## 11 Attachments

### 11.1 Overview

The Attachments Related Link displays all documents uploaded for a Case.

#### 11.1.1 Screenshot




The screenshot shows a table titled "Attachments" with the following columns: Attachment Id, Title, Attachment Type, Attachment Description, Last Modified Date, and Last Modified By. A single row is displayed with the following data: Attachment Id: DOC-000000023, Title: Test App pdf, Attachment Type: Prescription, Attachment Description: Developmental Script, Last Modified Date: 8/22/2022, 06:59 PM, and Last Modified By: Jane Moris. A small drop-down icon is visible at the end of the last row.

Attachment Id	Title	Attachment Type	Attachment Description	Last Modified Date	Last Modified By
DOC-000000023	Test App pdf	Prescription	Developmental Script	8/22/2022, 06:59 PM	Jane Moris

#### 11.1.2 Controls & User Actions

The following table details the controls that are present in the Attachments section. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Attachment ID	Click the hyperlink to preview document.	System Generated
Title	Displays the Title of document.	Read-Only
Attachment Type	Displays the document Attachment Type.	Read-Only
Attachment Description	Displays the document Attachment Description.	Read-Only
Last Modified Date	Displays the documents Last Modified Date.	Read-Only
Last Modified By	Displays name of person who Last Modified document.	Read-Only

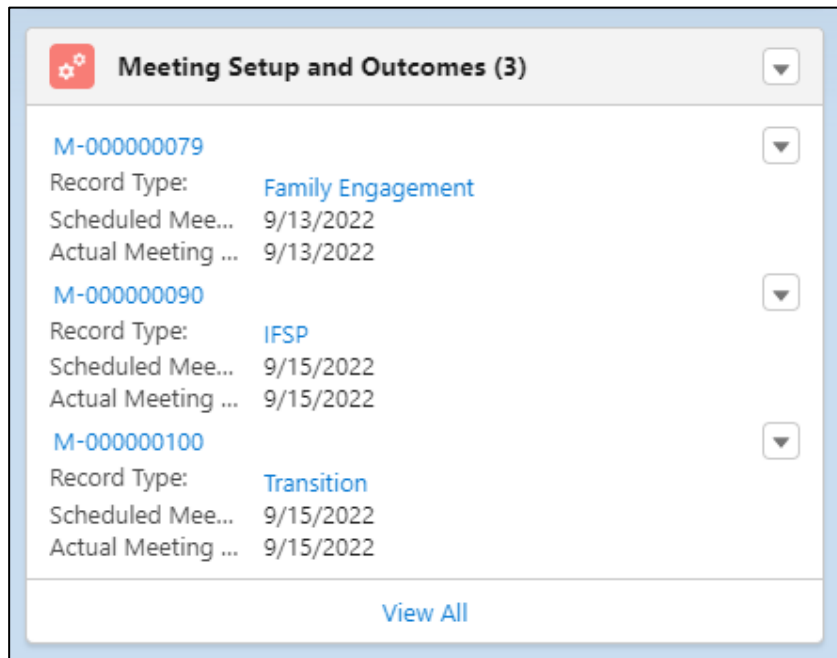
User Action	Description	
	Click drop-down button to download or delete attachment.	Always Enabled

## 12 Meeting Setup and Outcomes

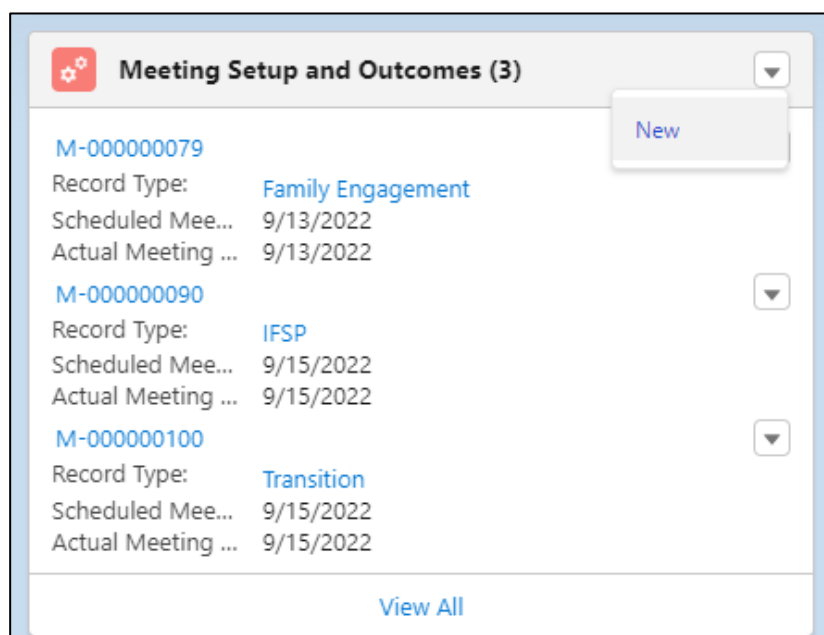
### 12.1 Overview

The Meeting Setup and Outcomes Related Link displays all meetings and outcomes for a Case.

#### 12.1.1 Screenshot



To schedule a meeting, select "New" from the dropdown menu.



On the New Meeting Setup and Outcome pop-up window, select the radio button next to the meeting record type and click Next.

### New Meeting Setup and Outcome

Select a record type

☒

Family Engagement

To schedule a family engagement meeting, select "Family Engagement" as the record type. Only fields related to a family engagement meeting will be shown in the New Meeting Setup and Outcome window.

☐

IFSP

To schedule an IFSP meeting, select "IFSP" as the record type. Only fields related to an IFSP meeting will be shown in the New Meeting Setup and Outcome window.

☐

Transition

To schedule a new transition meeting, select "Transition" as the record type. Only fields related to a Transition meeting will be shown in the New Meeting Setup and Outcome window.

Cancel

Next

## 12.1.2 Controls & User Actions - Family Engagement

Meeting Setup and Outcome  
**Freddy Hardman**

Case File ID  
CF-0000000068

Service Coordinator  
Samantha Davis - DDS SC

Record Type  
Family Engagement

IsConversion  
☐

Related List Quick Links ⓘ

Meeting Attendees (1)

Evaluations Requested (1)

Consent and Signatures (1)

Notes & Attachments (1)

Meeting Setup and Outcome History (7)

Notes (0)

**Details**

Meeting ID  
M-000000079

County where provider assists caregiver ⓘ

Client ⓘ  
Freddy Hardman

Record Type  
Family Engagement

Case File ID ⓘ  
CF-0000000068

Is Meeting Completed  
☒

Date, Time and Location

Other Delay Explanation ⓘ

Outcome

Meeting Outcome ⓘ  
Met with family, went over program, all procedural safe guards, gave parents choice of providers. Parents signed all paperwork.

Decline Services ⓘ

Decline Reason ⓘ

System Information

Created By  
 Samantha Davis - DDS SC, 9/13/2022, 11:06 AM

Last Modified By  
 Samantha Davis - DDS SC, 9/13/2022, 12:12 PM

Legacy Record ID ⓘ

The following table details the controls that are present in the Meeting Setup and Outcomes - Family Engagement meeting details. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Details</b>		
Meeting ID	Assigned when record is saved.	System-Generated
County where provider assists caregiver	Click the drop-down menu to make selection.	Mandatory
Client	Pre-populates with client's name.	Pre-populated
Record Type	Assigned based on Record Type selected.	System-Generated

Case File ID	Number assigned to Case by system.	System-Generated
Is Meeting Completed	This field is calculated upon save.	System-Generated
<b>Date, Time and Location</b>		
Scheduled Meeting Date	Click the calendar icon to make date selection.	Mandatory
Meeting Delivery Type	Click the drop-down menu to make selection.	Not Mandatory
Scheduled Meeting Time	Click the clock icon to make time selection.	Mandatory
Location of Meeting	Click in the textbox to enter location details.	Not Mandatory
Same as Scheduled	Click the checkbox when meeting takes place.	Same as Scheduled
Actual Meeting Time	Click the clock icon to make time selection.	Not Mandatory
Actual Meeting Date	Click the clock icon to make time selection.	Not Mandatory
<b>Explanation for Delay</b>		
Meeting Delayed	Click the drop-down menu to make selection.	Not Mandatory
Delayed Reason	Click the drop-down menu to make selection.	Not Mandatory
Other Delay Explanation	Click in the textbox to enter location details.	Not Mandatory
<b>Outcome</b>		
Meeting Outcome	Click in the textbox to enter location details.	Not Mandatory
Decline Services	Click the drop-down menu to make selection.	Not Mandatory
Decline Reason	Click the drop-down menu to make selection.	Not Mandatory
<b>System Information</b>		
Created By	Assigned by system with creator's name.	System-Generated
Last Modified By	Assigned by system of who last edited the record.	System-Generated
Legacy Record ID	Assigned if converted from legacy system.	System-Generated
<b>User Action</b>	<b>Description</b>	
Edit	Click button to edit case file details.	Always Enabled
Cancel	Click button to delete any changes made to the case file record and close the Edit view of the record.	Always Enabled

Save & New	Click button to save any changes made to the case file record and close the Edit view of the record.	Always Enabled
Save	Click button to save any changes made to the case file record and open a new meeting record.	Always Enabled

### 12.1.3 Controls & User Actions - IFSP

Meeting Setup and Outcome  
**Freddy Hardman**

Case File ID  
CF-0000000068
Service Coordinator  
Samantha Davis - DDS SC
IFSP Type  
Initial
Is Conversion  
☐

Related List Quick Links

- Meeting Attendees (2)
- Client Outcome (1)
- Goals (6)
- Evaluations Requested (1)
- Services (1)
- Consent and Signatures (1)
- Notes & Attachments (3)
- Meeting Setup and Outcome History (10+)
- Notes (0)

Details

Meeting ID  
M-0000000090
Record Type  
IFSP

Client  
Freddy Hardman
Is Meeting Completed  
☒

Case File ID  
CF-0000000068
Family Engagement Meeting

Date, Time and Location

Scheduled Meeting Date  
9/15/2022
Meeting Delivery Type  
Teleconference

Scheduled Meeting Time  
10:00:00 AM
Location of Meeting  
Zoom

Same as Scheduled  
☐

Actual Meeting Time  
10:15:00 AM

Actual Meeting Date  
9/15/2022

Explanation for Delay

Meeting Delayed  
Yes

Delayed Reason  
Other

Other Delay Explanation  
Traffic delay for client

IFSP Information

IFSP Type  
Initial
Interim IFSP Expiration Date

School District  
Bentonville
County where provider assists caregiver  
Benton

Dir to where intervention will occur

IFSP Determination

IFSP Team Determination Date  
9/15/2022
Program Eligibility Category  
Developmental Delay (DD)

Select the diagnosis  
06-Developmentally Delayed (Birth-5 Years)
Other Explanation

% of Qualifying Delay or ICD reasoning
Informed Clinical Opinion

Outcome

Meeting Outcome  
Meeting completed with parent, paperwork completed and parent chose provider for service and evaluation.

Decline Services

Decline Reason

System Information

Created By  
Samantha Davis - DDS SC, 9/15/2022, 9:22 AM
Last Modified By  
Samantha Davis - DDS SC, 9/15/2022, 10:47 AM

Legacy Record ID

The following table details the controls that are present in the Meeting Setup and Outcomes - IFSP meeting details. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Information</b>		
Meeting ID	Assigned when record is saved.	System-Generated
Record Type	Assigned based on Record Type selected.	System-Generated
Client	Click the lookup icon to make a selection.	Not Mandatory
Family Engagement Meeting	Click the lookup icon to make a selection.	Not Mandatory
Case File ID	Number assigned to Case by system.	System-Generated
<b>Date, Time and Location</b>		



Scheduled Meeting Date	Click the calendar icon to make a date selection.	Mandatory
Meeting Delivery Type	Click the drop-down menu to make selection.	Mandatory
Scheduled Meeting Time	Click the clock icon to make a time selection.	Mandatory
Location of Meeting	Click in the textbox to enter location details.	Not Mandatory
Same as Scheduled	Click the checkbox when meeting takes place.	Not Mandatory
Actual Meeting Time	Click the clock icon to make a time selection.	Not Mandatory
Actual Meeting Date	Click the calendar icon to make a date selection.	Not Mandatory
<b>Explanation for Delay</b>		
Meeting Delayed	Click the drop-down menu to make selection.	Not Mandatory
Delayed Reason	Click the drop-down menu to make selection.	Not Mandatory
Other Delay Explanation	Click in the textbox to enter details.	Not Mandatory
<b>IFSP Information</b>		
IFSP Type	Click the drop-down menu to make selection.	Mandatory
County where provider assists caregiver	Click the drop-down menu to make selection.	Mandatory
School District	Click the drop-down menu to make selection.	Not Mandatory
Dir to where intervention will occur	Click in the textbox to enter details.	Not Mandatory
<b>IFSP Determination</b>		
IFSP Team Determination Date	Click the clock icon to make time selection.	Not Mandatory
Program Eligibility Category	Click the drop-down menu to make selection.	Not Mandatory
Select the diagnosis	Make selection from the multi-select list.	Not Mandatory
Other Explanation	Click in the textbox to enter details.	Not Mandatory
% of Qualifying or ICO reasoning	Click in the textbox to enter details.	Not Mandatory
Informed Clinical Opinion	Click in the textbox to enter details.	Not Mandatory
<b>Outcome</b>		

Meeting Outcome	Click in the textbox to enter details.	Not Mandatory
Decline Services	Click the drop-down menu to make selection.	Not Mandatory
Decline Reason	Click in the textbox to enter details.	Not Mandatory

#### **System Information**

Created By	Displays the name of person who created record.	System-Generated
Last Modified By	Displays the name of person who last modified record.	System-Generated
Legacy Record ID	Assigned if converted from legacy system.	System-Generated

User Action	Description	
Edit	Click button to edit case file details.	Always Enabled
Cancel	Click button to delete any changes made to the case file record and close the Edit view of the record.	Always Enabled
Save & New	Click button to save any changes made to the case file record and close the Edit view of the record.	Always Enabled
Save	Click button to save any changes made to the case file record and open a new meeting record.	Always Enabled

## 12.1.4 Controls & User Actions - Transition

**Meeting Setup and Outcome**  
**Freddy Hardman**

Case File ID: CF-0000000068 | Service Coordinator: Samantha Davis - DDS SC | Transition Type: | Is Conversion: ☐

**Related List Quick Links**

- Meeting Attendees (2)
- Client Outcome (1)
- Transition (1)
- Consent and Signatures (1)
- Notes & Attachments (0)
- Meeting Setup and Outcome History (7)
- Notes (0)

**Details**

Meeting ID: M-000000100 | Planning Begin Date:  | Client: [Freddy Hardman](#) | Family Engagement Meeting:  | Case File ID: [CF-0000000068](#) | Is Meeting Completed: ☒ | Transition Type:

**▼ Date, Time and Location**

Scheduled Meeting Date: 9/15/2022 | Meeting Delivery Type: Teleconference | Scheduled Meeting Time: 1:00:00 PM | Location of Meeting: Zoom | Same as Scheduled: ☒ | Actual Meeting Time: 1:00:00 PM | Actual Meeting Date: 9/15/2022

**▼ Explanation for Delay**

Meeting Delayed:  | Delayed Reason:  | Other Delay Explanation:

**▼ Transition Information**

Part B Eligible: Yes | LEA Notice: 6/15/2022 | Where will the client transition to: Home | Other Transition Description:  | Name of Facility:  | Contact Person:  | Contact Phone:

**▼ Outcome**

Meeting Outcome: Meeting held on 9/15/22, talked with parents regarding transition steps and plan; paperwork completed. | Decline Services:  | Decline Reason:

**▼ System Information**

Created By: Samantha Davis - DDS SC, 9/15/2022, 2:14 PM | Last Modified By: Samantha Davis, 10/6/2022, 10:38 AM | Legacy Record ID:

The following table details the controls that are present in the Meeting Setup and Outcomes - Transition meeting details. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Details</b>		
Meeting ID	Assigned when record is saved.	System-Generated
Planning Begin Date	Click the calendar icon to make date selection.	Not Mandatory
Client	Name of child referred to First Connections program.	Hyperlink
Family Engagement Meeting	Click the lookup icon to make selection.	Not Mandatory
Case File ID	Number assigned to Case by system.	System-Generated
Is Meeting Completed	This field is calculated upon save.	System-Generated
Transition Type	Click the drop-down menu to make selection.	Not Mandatory
<b>Date, Time and Location</b>		

Scheduled Meeting Date	Click the calendar icon to make date selection.	Mandatory
Meeting Delivery Type	Click the drop-down menu to make selection.	Mandatory
Scheduled Meeting Time	Click the clock icon to make time selection.	Mandatory
Location of Meeting	Click in the textbox to enter location details.	Not Mandatory
Same as Scheduled	Click the checkbox when meeting takes place.	Not Mandatory
Actual Meeting Time	Click the clock icon to make time selection	Not Mandatory
Actual Meeting Date	Click the calendar icon to make time selection.	Not Mandatory
<b>Explanation for Delay</b>		
Meeting Delayed	Click the drop-down menu to make selection.	Not Mandatory
Delayed Reason	Click the drop-down menu to make selection.	Not Mandatory
Other Delay Explanation	Click in the textbox to enter details.	Not Mandatory
<b>Transition Information</b>		
Part B Eligible	Click the drop-down menu to make selection.	Mandatory
LEA Notice	Click the calendar icon to make time selection.	Not Mandatory
Where will the client transition to	Click the drop-down menu to make selection.	
Other Transition Description	Click in the textbox to enter details.	Not Mandatory
Name of Facility	Click in the textbox to enter details.	Not Mandatory
Contact Person	Click in the textbox to enter details.	Not Mandatory
Contact Phone	Click in the textbox to enter details.	Not Mandatory
<b>Outcome</b>		
Meeting Outcome	Click in the textbox to enter details.	Not Mandatory
Decline Services	Click the drop-down menu to make selection.	Not Mandatory
Decline Reason	Click in the textbox to enter details.	Not Mandatory
<b>System Information</b>		
Created By	Displays the name of person who created record.	System-Generated
Last Modified By	Displays the name of person who last modified record.	System-Generated
Legacy Record ID	Assigned if converted from legacy system.	System-Generated

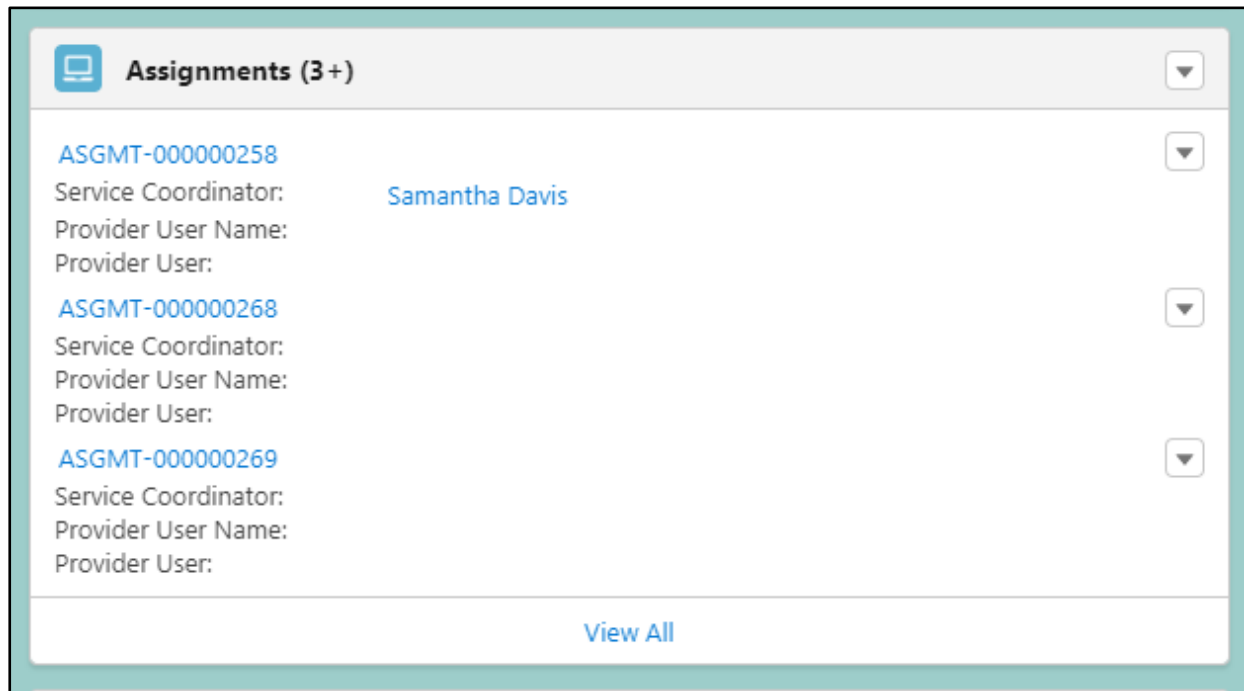
User Action	Description	
Edit	Click button to edit case file details.	Always Enabled
Cancel	Click button to delete any changes made to the case file record and close the Edit view of the record.	Always Enabled
Save & New	Click button to save any changes made to the case file record and close the Edit view of the record.	Always Enabled
Save	Click button to save any changes made to the case file record and open a new meeting record.	Always Enabled

## 13 Assignments

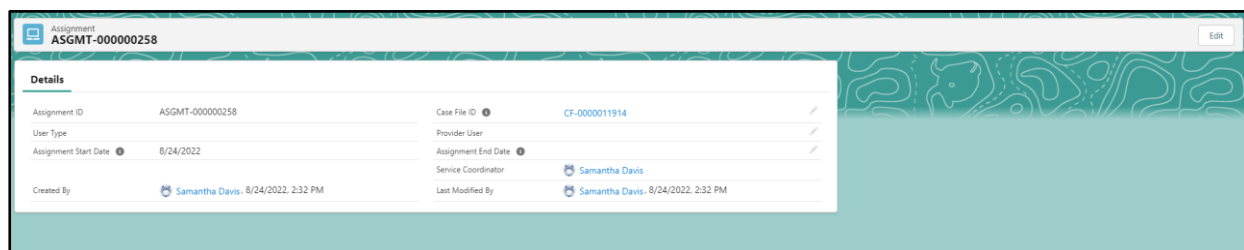
### 13.1 Overview

The Assignments Related Link displays all assignments for a Case.

#### 13.1.1 Screenshot



#### 13.1.2 Controls & User Actions



The following table details the controls that are present in the Attachments section. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Details</b>		
Assignment ID	Assigned by the system upon save.	Not Mandatory
Case File ID	Number assigned to Case by system.	System-Generated
User Type	Assigned by the system.	Not Mandatory

Provider User	Click the lookup icon ad make selection.	Not Mandatory
Assignment Start Date	Click the calendar icon and make date selection.	Not Mandatory
Assignment End Date	Click the calendar icon and make date selection.	Mandatory
Service Coordinator	Assigned by the system.	Not Mandatory
<b>System Information</b>		
Created By	Displays the name of person who created record.	System-Generated
Last Modified By	Displays the name of person who last modified record.	System-Generated
<b>User Action</b>	<b>Description</b>	
Edit	Click button to edit case file details.	Always Enabled
Cancel	Click button to delete any changes made to the case file record and close the Edit view of the record.	Always Enabled
Save & New	Click button to save any changes made to the case file record and close the Edit view of the record.	Always Enabled
Save	Click button to save any changes made to the case file record and open a new meeting record.	Always Enabled

## 14 Client, Family, and Other Contacts

### 14.1 Overview

The Client, Family, and Other Contacts page displays contacts connected to the case.

#### 14.1.1 Screenshot

This screenshot shows the 'New Client, Family and Other Contacts' form. It features three radio button options for selecting a record type: 'Client Contact' (selected), 'Client', and 'Provider Contact'. Each option includes a brief description of its purpose. At the bottom right, there are 'Cancel' and 'Next' buttons.

**New Client, Family and Other Contacts**

Select a record type

- ☒ **Client Contact**  
To create a record for people who are connected with a client (e.g., caregivers, physicians, family members, etc.) select "Client Contact" as the record type.
- ☐ **Client**  
A child who has or is suspected of having a developmental delay or disability. Since client records are automatically created when a referral is converted into a case file, this record type should not be used to create a client record.
- ☐ **Provider Contact**  
To create a record for people who are connected with a provider (e.g., executive directors and primary contacts), select "Provider Contact" as the record type.

[Cancel](#) [Next](#)

#### 14.1.2 Screenshot – Client Contact

This screenshot shows the 'New Contact: Client Contact' form. It is a detailed form for creating a new client contact. It includes fields for Title, Name (Salutation, First Name, Middle Name, Last Name, Suffix), Client Name (Search Provider Contacts...), Source of Income, Active Contact (checkbox), Relationship (dropdown), Relationship Explanation, Monthly Income, Case File ID, Legacy Record ID, Phone Type, and Has Email. The form is organized into sections and includes a 'Contact Information' section at the bottom. At the bottom right, there are 'Cancel', 'Save & New', and 'Save' buttons.

**New Contact: Client Contact**

Title

**\* Name**

Salutation

First Name

Middle Name

\* Last Name

Suffix

Suffix

\* Client Name

Source of Income

Active Contact ☒

\* Relationship

Relationship Explanation

Monthly Income

Case File ID

Legacy Record ID

**Contact Information**

\* Phone Type

\* Has Email

[Cancel](#) [Save & New](#) [Save](#)



### 14.1.2.1 Controls & User Actions

The following table details the controls that are present on the Client Contact record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Title	Click in the textbox and document information.	Not Mandatory
Client, Family and Other Contacts Record Type	Displays the selected record type	System Generated
Name	Click in the textbox and enter information for the following fields - Salutation - First Name - Middle Name - Last Name - Suffix	Mandatory
Primary Caregiver	Click the dropdown menu and make selection.	Mandatory
Suffix	Click the dropdown menu and make selection.	Not Mandatory
Relationship	Click the dropdown menu and make selection.	Mandatory
Client Name	Click in the lookup field and enter information.	Mandatory
Other Relationship Explanation	Click in the textbox and enter information.	Not Mandatory
Source of Income	Click in the textbox and enter information.	Not Mandatory
Monthly Income	Click in the textbox and enter information.	Not Mandatory
Active Contact	Displays active if the person is an active contact; would not display if the person is inactive.	System Generated
Case File ID	Displays the case file number associated with the client.	Not Mandatory
Legacy Record ID	Displays only if the record was converted from the Legacy application.	System Generated
<b>Contact Information</b>		
Phone Type	Click the dropdown menu and make selection.	Mandatory
Has Email	Click the dropdown menu and make selection.	Mandatory
Phone	Click in the textbox and enter information.	Mandatory
Email	Click in the textbox and enter information.	Not Mandatory
Work Phone Ext	Click in the textbox and enter information.	Not Mandatory
Contact Method Preference	Click the dropdown menu and make selection.	Mandatory
Work Phone	Click in the textbox and enter information.	Not Mandatory

Contact Frequency Preference	Click the dropdown menu and make selection.	Not Mandatory
<b>Alternate Contact</b>		
Alternate Contact Name	Click in the textbox and enter information.	Not Mandatory
Alternate Contact Number	Click in the textbox and enter information.	Not Mandatory
<b>Physical Address</b>		
Physical Address Same as Client	Click the checkbox if applicable.	Not Mandatory
Physical Address 1	Click in the textbox and enter information.	Conditionally Mandatory
Physical Address 2	Click in the textbox and enter information.	Conditionally Mandatory
Physical City	Click in the textbox and enter information.	Conditionally Mandatory
Physical State	Click the dropdown menu and make selection.	Conditionally Mandatory
Physical County	Click the dropdown menu and make selection.	Conditionally Mandatory
Physical Zip Code	Click in the textbox and enter information.	Conditionally Mandatory
<b>Mailing Address</b>		
Mailing Addr Same as Physical Addr	Click the checkbox if applicable.	Not Mandatory
Mailing Addr Same as Client Mailing Addr	Click the checkbox if applicable.	Not Mandatory
Mailing Address 1	Click in the textbox and enter information.	Conditionally Mandatory
Mailing Address 2	Click in the textbox and enter information.	Conditionally Mandatory
Mailing City	Click in the textbox and enter information.	Conditionally Mandatory
Mailing State	Click the dropdown menu and make selection.	Conditionally Mandatory
Mailing County	Click the dropdown menu and make selection.	Conditionally Mandatory
Mailing Zip Code	Click in the textbox and enter information.	Conditionally Mandatory

<b>Language</b>		
Primary Language Spoken at Home	Click the dropdown menu and make selection.	Mandatory
Other Language Description	Click in the textbox and enter information.	Not Mandatory
Interpreter Needed	Click the dropdown menu and make selection.	Mandatory
<b>Additional Information</b>		
Directions to intervention	Click in the text area and enter information.	Not Mandatory
<b>System Information</b>		
Provider Name	Click in the lookup field and enter information.	
<b>User Action</b>	<b>Description</b>	
Cancel	Click the cancel button if you wish to leave the page and not save any information.	
Save & New	Click the save & new button if you wish to save the information and open a new window.	
Save	Click the save button if you wish to save the information and remain on the page.	

### 14.1.3 Screenshot – Client

#### 14.1.3.1 Controls & User Actions

The following table details the controls that are present on the Client page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Client, Family and Other Contacts Record Type</b>		
DDDS ID	Displays the system-generated DDDS ID number.	System Generated
Name	Click in the textbox and enter information for the following fields - Salutation - First Name - Middle Name - Last Name - Suffix	Mandatory
Client Gender	Click the drop-down menu to select client's gender.	Mandatory
Title	Click in the textbox and enter title.	Not Mandatory
Is a Multiple	Click the dropdown to make selection	Mandatory

Case File ID	Displays the case file number associated with the client.	Not Mandatory
Client Race	Click the dropdown to select client race.	Mandatory
Date of Birth	Click the calendar icon to make date selection.	Mandatory
Client Race Details Explanation	Click in the textbox and enter information.	Not Mandatory
Client Date of Death	Click the dropdown and select the client race details.	Not Mandatory
Legacy Record ID	Displays only if the record was converted from the Legacy application.	Not Mandatory
Client Social Security Number	Click in the textbox to enter the client's SSN.	Not Mandatory
Client Race Details	Click in the textbox and enter information.	Not Mandatory
Client Ethnicity	Click the dropdown and select the client's ethnicity.	Mandatory
<b>Prescription Information</b>		
Client has a prescription	Click the dropdown and make selection.	Mandatory
Prescription Type	Click the selection from the multi-select picklist.	Not Mandatory
Prescription Date	Click the calendar icon and make date selection.	Not Mandatory
<b>Physical Address</b>		
Physical County	Click the drop-down to make County selection.	Mandatory
Physical Address	Click in the text box to enter physical address.	Mandatory
Physical Address 2	Click in the text box to enter addition physical address details.	Not Mandatory
Physical City	Click in the text box to enter City.	Mandatory
Physical State	Click the drop-down to select State.	Mandatory
Physical Zip Code	Click in the text box to enter Zip Code	Mandatory
<b>Mailing Address</b>		
Mailing Address Same as Physical Address	Click the checkbox if the mailing and physical address are the same.	Mandatory
Mailing Address	Click in the text box to enter mailing address.	Conditionally Mandatory
Mailing Address 2	Click in the text box to enter addition mailing address details.	Conditionally Mandatory
Mailing City	Click in the text box to enter City.	Conditionally Mandatory

Mailing State	Click the drop-down to select State.	Conditionally Mandatory
Mailing County	Click the drop-down to select County.	Conditionally Mandatory
Mailing Zip Code	Click in the text box to enter Zip Code.	Conditionally Mandatory
<b>Medical Information</b>		
Policyholder Name	Click in the textbox and enter information.	
Insurance	Click the dropdown menu and make selection.	Mandatory
Policyholder Relationship to Client	Click the dropdown menu and make selection.	Not Mandatory
Client Insurance Number	Click in the textbox and enter information.	Not Mandatory
Policyholder Date of Birth	Click the calendar icon and make date selection.	Not Mandatory
Plan Name	Click in the textbox and enter information.	Not Mandatory
Group Number	Click in the textbox and enter information.	Not Mandatory
Client Medicaid Number	Click in the textbox and enter information.	Not Mandatory
Member Number	Click in the textbox and enter information.	Not Mandatory
Insurance Company Name	Click in the textbox and enter information.	Not Mandatory
Policyholder Mailing Address 1	Click in the textbox and enter information.	Not Mandatory
Policyholder Mailing Address 2	Click in the textbox and enter information.	Not Mandatory
Policyholder City	Click in the textbox and enter information.	Not Mandatory
Policyholder State	Click the dropdown menu and make selection.	Not Mandatory
Policyholder Zip Code	Click in the textbox and enter information.	Not Mandatory
Effective Date	Click the calendar icon and make date selection.	Not Mandatory
Insurance Company Claim 1	Click in the textbox and enter information.	Not Mandatory
Insurance Company Claim 2	Click in the textbox and enter information.	Not Mandatory
Insurance Company Claim City	Click in the textbox and enter information.	Not Mandatory

Insurance Company Claim State	Click the dropdown menu and make selection.	Not Mandatory
Insurance Company Claim Zip Code	Click in the textbox and enter information.	Not Mandatory
Insurance Company Phone	Click in the textbox and enter information.	Not Mandatory
Employer Name	Click in the textbox and enter information.	Not Mandatory
Employer Address 1	Click in the textbox and enter information.	Not Mandatory
Employer 2	Click in the textbox and enter information.	Not Mandatory
Employer Address City	Click in the textbox and enter information.	Not Mandatory
Employer Address State	Click the dropdown menu and make selection.	Not Mandatory
Employer Address Zip Code	Click in the textbox and enter information.	Not Mandatory
Copay	Click in the textbox and enter information.	Not Mandatory
Copay Amount	Click in the textbox and enter information.	Not Mandatory
Deductible	Click in the textbox and enter information.	Not Mandatory
<b>Medical Diagnosis</b>		
Interim IFSP required	Click the dropdown menu and make selection.	Mandatory
Any Med Diagnosis likely to result in DD	Click in the selection area and make selection.	Not Mandatory
Other Explanation	Click in the textbox and enter information.	Not Mandatory
Developmental Screening Completed	Click in the selection area and make selection.	Not Mandatory
<b>Physician Information</b>		
Primary Care Physician Name	Click in the textbox and enter information.	Not Mandatory
Primary Care Physician Clinic Name	Click in the textbox and enter information.	Not Mandatory
Physician Email	Click in the textbox and enter information.	Not Mandatory
Primary Care Physician Contact Pref	Click the dropdown menu and make selection.	Not Mandatory

Primary Care Physician City	Click in the textbox and enter information.	Not Mandatory
Primary Care Physician Fax	Click in the textbox and enter information.	Not Mandatory
Primary Care Physician Phone Number	Click in the textbox and enter information.	
<b>System Information</b>		
First Connections Provider Name	Click in the lookup field and enter information.	

User Action	Description
Cancel	Click the cancel button if you wish to leave the page and not save any information.
Save & New	Click the save & new button if you wish to save the information and open a new window.
Save	Click the save button if you wish to save the information and remain on the page.



## 14.1.4 Screenshot – Provider Contact

The screenshot shows a web form for adding a provider contact. The form is titled "New Client, Family and Other Contacts: Provider Contact". It has a section header "Client, Family and Other Contacts Information". The form contains several input fields and dropdown menus. The "Contact ID" field is pre-filled with a system-generated value. The "Contact Type" is a dropdown menu currently set to "--None--". The "Name" section includes fields for Salutation, First Name, Middle Name, Last Name, and Suffix. There are also fields for Title, Work Phone Ext, Cell Phone, Fax, and Email. A "First Connections Provider Name" field has a search icon. At the bottom, there are "Cancel", "Save & New", and "Save" buttons. A "Legacy Record ID" field is also present.

### 14.1.4.1 Controls & User Actions

The following table details the controls that are present on the Provider Contact record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Client, Family and Other Contacts Record Type</b>		
Contact ID	Displays the system-generated Contact ID number.	System Generated
Contact Type	Click the dropdown menu and make selection.	Mandatory
Name	Click in the textbox and enter information for the following fields - Salutation - First Name - Middle Name - Last Name - Suffix	Mandatory
Title	Click in the textbox and enter title.	Not Mandatory
Work Phone Ext	Click in the textbox and enter information.	Not Mandatory

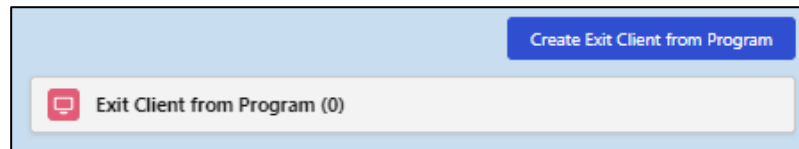
First Connections Provider Name	Click the dropdown menu and make selection.	Mandatory
Cell Phone	Click in the textbox and enter information.	Not Mandatory
Work Phone	Click in the textbox and enter information.	Mandatory
Fax	Click in the textbox and enter information.	Not Mandatory
Email	Click in the textbox and enter information.	Mandatory
Legacy Record ID	Displays only if the record was converted from the Legacy application.	System-Generated
<b>Physical Address</b>		
Physical Address 1	Click in the text box to enter physical address.	Mandatory
Physical Address 2	Click in the text box to enter addition physical address details.	Not Mandatory
Physical City	Click in the text box to enter City.	Mandatory
Physical State	Click the drop-down to select State.	Mandatory
Physical Zip Code	Click in the text box to enter Zip Code	Mandatory
Physical County	Click the drop-down to make County selection.	Mandatory
<b>Mailing Address</b>		
Mailing Address Same as Physical Address	Click the checkbox if the mailing and physical address are the same.	Mandatory
Mailing Address 1	Click in the text box to enter mailing address.	Conditionally Mandatory
Mailing Address 2	Click in the text box to enter addition mailing address details.	Conditionally Mandatory
Mailing City	Click in the text box to enter City.	Conditionally Mandatory
Mailing State	Click the drop-down to select State.	Conditionally Mandatory
Mailing County	Click the drop-down to select County.	Conditionally Mandatory
Mailing Zip Code	Click in the text box to enter Zip Code.	Conditionally Mandatory

## 15 Exit Client from Program

### 15.1 Overview

The Exit Client from Program record displays exit criteria when a client leaves the EI program.

#### 15.1.1 Screenshot



When the Exit Client from Program button is selected, document information in the required fields.

A screenshot of a web form titled 'Create Exit Client from Program'. The form has a light gray header with the title. Below the header is a section titled 'Information' in bold. The form contains several fields: 'Case File ID' with a green icon and the value 'CF-0000000068'; 'Family Resource' with a search icon and the text 'Search Family Resources, Priorities, and Co'; 'Client Name' with a purple icon and the value 'Freddy Hardman'; 'Exit Date' with a calendar icon; 'MEISR-COS Rating' with a search icon and the text 'Search Client Outcomes...'; 'Family Survey was completed' with a dropdown menu showing '--None--'; and 'Exit Reason' with a dropdown menu showing '--None--'. At the bottom of the form are three buttons: 'Cancel', 'Save & New', and 'Save'.

#### 15.1.2 Controls & User Actions

The following table details the controls that are present in the Exit Client from Program record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Client Header</b>		
Case File ID	Displays the case file's unique identification number.	System-Generated
Family Resource	Click in the textbox to indicate whether the family was referred to an outside agency.	Not Mandatory

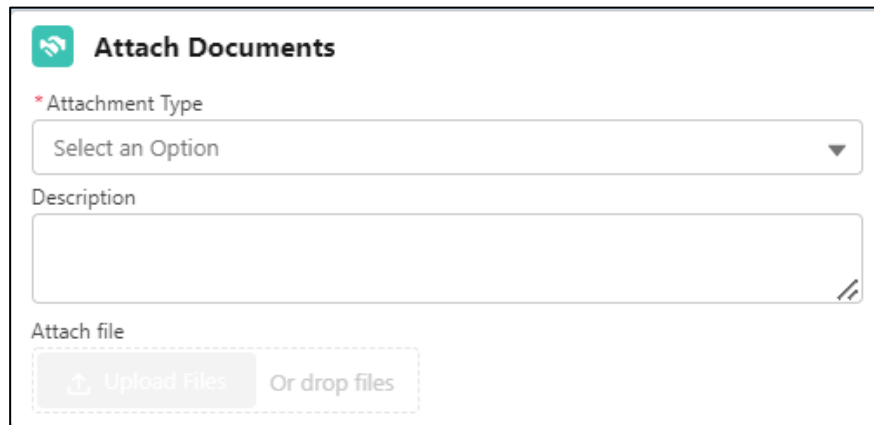
Client Name	Displays the client's name.	System-Generated
Exit Date	Click the calendar icon to make date selection when the client leaves the program.	Mandatory
MEISR-COS Rating	Click in the textbox to enter the client's final rating when leaving the program.	Not Mandatory
Family Survey was completed	Click the dropdown to select the family survey was completed.	Mandatory
Exit Reason	Click the dropdown menu to select the reason why the client is leaving the program.	Mandatory
User Action	Description	
Cancel	Click the cancel button to leave the page and not save any information.	
Save & New	Click the save & new button to save the information and open a new window.	
Save	Click the save button to save the information and remain on the page.	

## 16 Attach Documents

### 16.1 Overview

The Attach Documents Related Link allows the user to attach documents to the record. Uploaded documents will appear under the Attachments section.

#### 16.1.1 Screenshot

A screenshot of a web form titled "Attach Documents" with a green icon. The form contains three main sections: 1. "Attachment Type" with a red asterisk and a dropdown menu showing "Select an Option". 2. "Description" with a large text input area and a small edit icon at the bottom right. 3. "Attach file" with a dashed border containing an "Upload Files" button with an upward arrow icon and the text "Or drop files".

#### 16.1.2 Controls & User Actions

The following table details the controls that are present in the Attach Documents Related Link. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Attachment Type	Click the dropdown menu to select a picklist value.	Mandatory
Description	Click in the text area to enter the document description.	Not Mandatory

User Action	Description
Attach File	Click to upload a document to the record.
Drop Files	Click to move a document to the record.

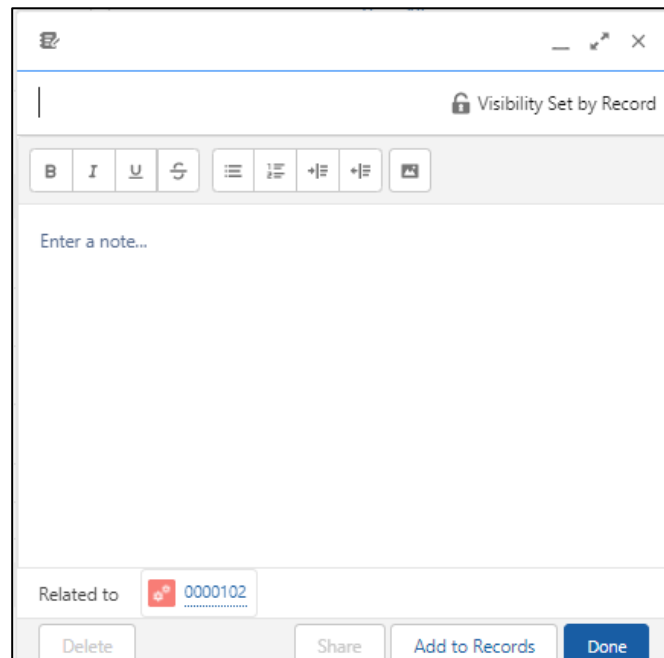
## 17 Notes

### 17.1 Overview

The Notes Related Link displays any documented notes and allows the user to create new Notes to attach to the record.

#### 17.1.1 Screenshot

Click 'Add to Records' or 'Done' to save the new note on Application Record. 'Delete' or 'Share' enables only when text is displayed in the Subject of the note.



#### 17.1.2 Controls & User Actions

The following table details the controls that are present on the Notes Related Link. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Subject Field	Click in the textbox field to enter a name of the note.	Not Mandatory
Body	Click in the text area field to enter note details.	Not Mandatory
Related To	Displays the case file number the note is attached to.	System Generated
User Action	Description	
Add to Records	Click to add note to record.	
Done	Click when note is completed.	

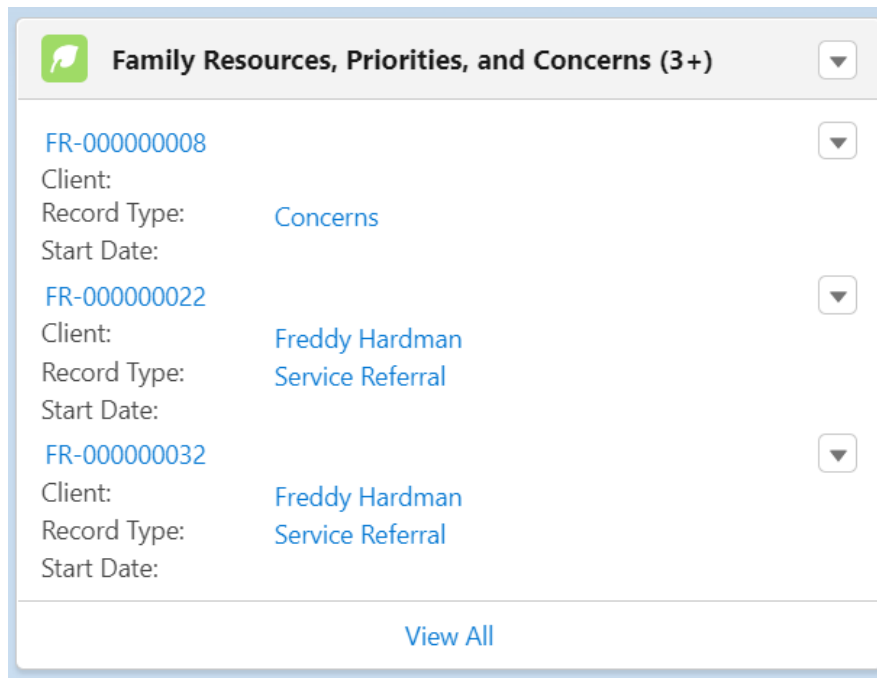
Delete	Click to remove note from record.
Share	Click to share note with others.

## 18 Family Resources Priorities and Concerns

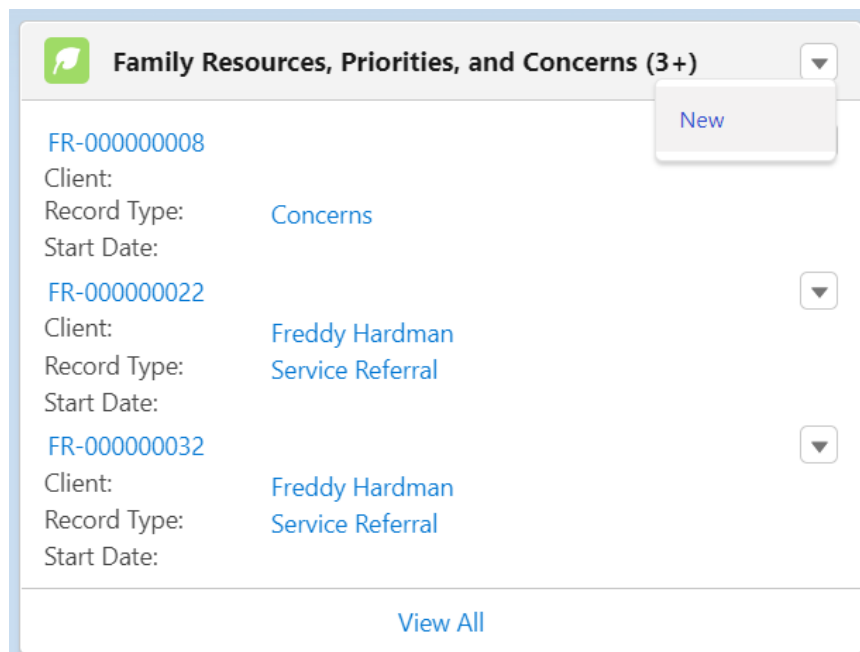
### 18.1 Overview

The Family Resources, Priorities, and Concerns Related link displays the parent/legal guardian's concerns for the child, priorities for the child, and service referral information.

#### 18.1.1 Screenshot



To create a new record, select "New" from the dropdown menu.





On the New Family Resources, Priorities, and Concerns pop-up window, select the radio button next to the record type and click Next.

New Family Resources Priorities and Concerns

Select a record type

- ☒ **Concerns**  
Used to capture the needs, issues or problems the parents wish to address
- ☐ **Priorities**  
Areas which the family identifies as essentials to their infants/toddler's development and important to the family
- ☐ **Service Referral**  
Services the client is receiving or could receive from a third party

### 18.1.1.1 Controls & User Actions - Concerns

New Family Resources, Priorities, and Concerns: Concerns

**Information**

Family Resources ID: \_\_\_\_\_ Client Contact: Thomas Hardman

**Early Intervention and Development Concerns**

\*EI, skills, and development concerns: --None-- Focus of Concern: --None--

Other Concerns Explanation: \_\_\_\_\_

**Additional Assistance Information**

Assistance Needed: \_\_\_\_\_ Assistance Provided By: \_\_\_\_\_

The following table details the controls that are present on the New Family Resources, Priorities, and Concerns: Concerns record page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Information</b>		
Family Resources ID	The ID Number will auto-populate after the record is saved.	System Generated
Client Contact	Displays the Parents/Legal Guardians name.	System Generated
<b>Early Intervention and Development Concerns</b>		

El, skills, and development concerns	Click the dropdown menu and make selection.	Mandatory
Focus of Concern	Click the dropdown menu and make selection.	Conditionally Mandatory
Other Concerns Explanation	Click in the textbox and enter information.	Not Mandatory
<b>Additional Assistance Information</b>		
Assistance Needed	Click in the textbox and enter information.	Not Mandatory
Assistance Provided By	Click in the textbox and enter information.	Not Mandatory
<b>User Action</b>	<b>Description</b>	
Cancel	Click the cancel button to leave the page and not save any information.	
Save & New	Click the save & new button to save the information and open a new window.	
Save	Click the save button to save the information and remain on the page.	

### 18.1.1.2 Controls & User Actions - Priorities

The following table details the controls that are present on the New Family Resources, Priorities, and Concerns: Priorities record page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Information</b>		
Family Resources ID	This number will be auto-populated after saving the record.	System Generated

Client Contact	Displays the Parents/Legal Guardians name.	System Generated
<b>Family Priorities</b>		
What do you want your child to do now?	Click the dropdown menu and make selection.	Mandatory
Focus of Priority	Click the dropdown menu and make selection.	Conditionally Mandatory
Other Priorities Explanation	Click in the textbox and enter information.	Not Mandatory

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

### 18.1.1.3 Controls & User Actions - Service Referral

The following table details the controls that are present on the New Family Resources, Priorities, and Concerns: Service Referral record page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Information</b>		
Family Resources ID	This number will be auto-populated after saving the record.	System Generated
Client	Click the lookup icon to select the clients/child's name.	Not Mandatory

---

**External Services**

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Enrollment Type	Click the dropdown menu and make selection.	Mandatory
Service Name	Click the dropdown menu and make selection.	Mandatory
Other Service Description	Click in the textbox and enter information.	Not Mandatory
Name	Click in the textbox and enter information.	Not Mandatory
Phone	Click in the textbox and enter information.	Not Mandatory

---

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

---

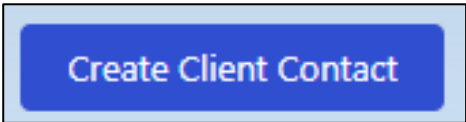
# 19 Create Client Contact

## 19.1 Overview

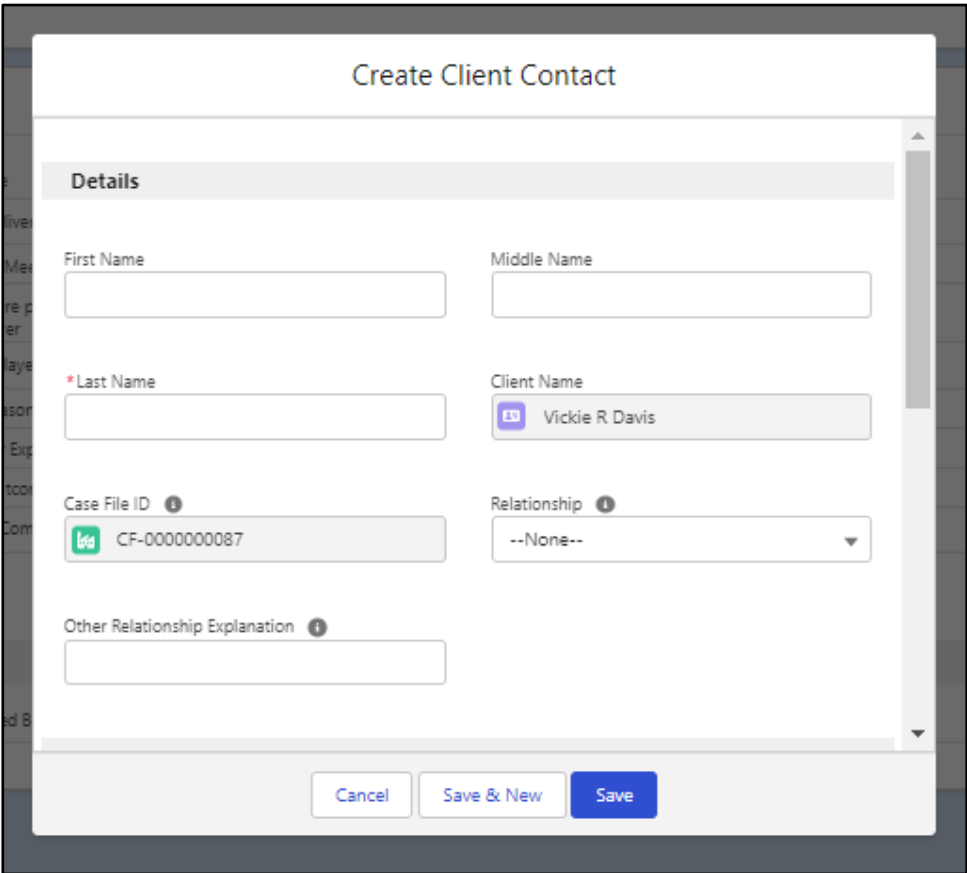
The Create Client Contact button on the Meeting Setup and Outcome page, allows the user to quickly document contact information for a person who is attending the meeting but not currently present in the AR DDS First Connections system.

### 19.1.1 Screenshot

On the Case File record, click the Create Client Contact button.



After the record opens, document the required field information.



#### 19.1.1.1 Controls & User Actions

The following table details the controls that are present on the Create Client Contact record. Each control includes a description and control type. Each user action includes a description.

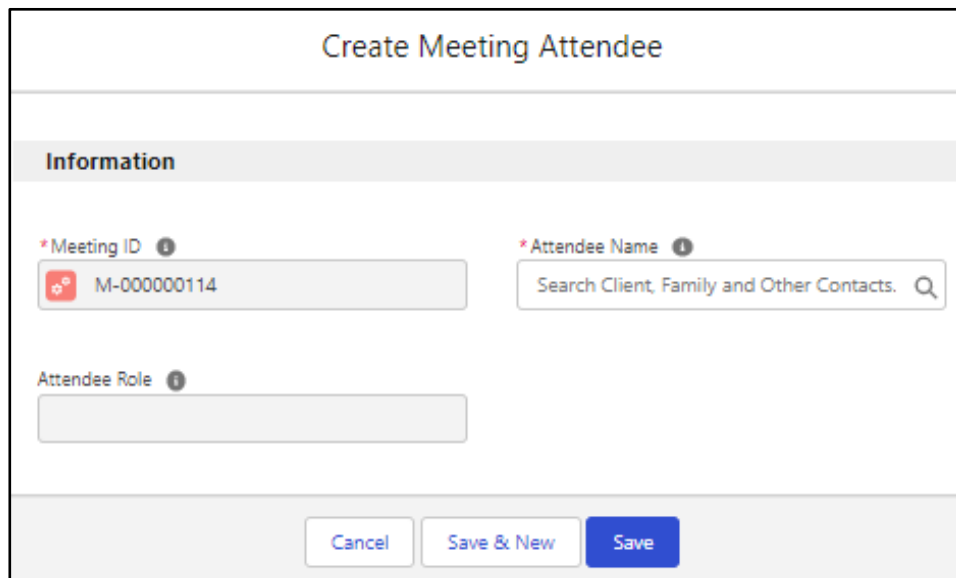
Controls	Description	Control Type
First Name	Click in the textbox and enter information.	Not Mandatory
Middle Name	Click in the textbox and enter information.	Not Mandatory
Last Name	Click in the textbox and enter information.	Mandatory
Client Name	The system populates the field with the client's name.	System Generated
Case File ID	The system populates the field with the Case File ID.	Not Mandatory
Relationship	Click the dropdown menu and make selection.	Not Mandatory
Other Relationship Explanation	Click in the textbox and enter information.	Not Mandatory
User Action	Description	
Cancel	Click the cancel button to leave the page and not save any information.	
Save & New	Click the save & new button to save the information and open a new window.	
Save	Click the save button to save the information and remain on the page.	

## 20 Create Meeting Attendee

### 20.1 Overview

The Create Meeting Attendee allows the user to link the person attending the meeting to their contact information that is currently present in the AR DDS First Connections system.

#### 20.1.1 Screenshot



##### 20.1.1.1 Controls & User Actions

The following table details the controls that are present on the Create Meeting Attendee record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Meeting ID	The system populates the field with the Meeting ID.	Read-only
Attendee Name	Click the lookup icon to search and select the meeting attendant. (If you begin typing name a list will populate and selection can be made)	Mandatory
Attendee Role	This displays the role of the meeting attendant.	Read-only
User Action	Description	
Cancel	Click the cancel button to leave the page and not save any information.	
Save & New	Click the save & new button to save the information and open a new window.	
Save	Click the save button to save the information and remain on the page.	

## 21 Client Outcome

### 21.1 Overview

The Client Outcome related link displays documented information in reference to the MEISR COS.

#### 21.1.1 Screenshot

New Client Outcome

Information

Outcome ID Meeting M-000000090

Legacy Summary of Relevant Results

Legacy Progress Description

MEISR COS Rating

\* Contributor Name Search Provider Contacts... \* Positive Social Emotional Relationships --None--

\* Appropriate Behavior to Meet Needs --None-- Did the child make progress in any area? --None--

\* Acquire and Use Knowledge and Skills --None--

Cancel Save & New Save

##### 21.1.1.1 Controls & User Actions

The following table details the controls that are present on the Client Outcome Related Link. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Information Section</b>		System Generated
Outcome ID	The system populates the field with the Outcome ID.	System Generated
Meeting	The system displays the Meeting ID number.	System Generated
Legacy Summary of Relevant Results	This displays the summary of relevant results from the legacy CDS application is displayed.	Read-only
Legacy Progress Description	This displays the progress description from the legacy CDS application is displayed.	Read-only



---

**MEISR COS  
Rating**

---

Contributor Name	Click the lookup icon to search and select the meeting attendant. (If you begin typing name a list will populate and selection can be made)	Mandatory
Positive Social Emotional Relationships	Click the dropdown menu and make selection.	Mandatory
Appropriate Behaviour to Meet Needs	Click the dropdown menu and make selection.	Mandatory
Did the child make progress in any area?	Click the dropdown menu and make selection. This field is not required for Initial or Interim IFSP; however, required for Annual and Bi-Annual.	Not Mandatory
Acquire and Use Knowledge and Skills	Click the dropdown menu and make selection.	Mandatory

---

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

---

## 22 Goals

### 22.1 Overview

The Goals related link displays the documented goals and objectives for the client and family.

#### 22.1.1 Screenshot

New Goal

Select a record type

☒ Client  
To create a participation-based goal for a client, select "Client" as the record type. Only fields related to client goals will be shown in the New Goal Client window.

☐ Family  
To create a goal for a client's family, select "Family" as the record type. Only fields related to family goals will be shown in the New Goal Family window.

Cancel Next

#### 22.1.1.1 Controls & User Actions – New Goal: Client

New Goal: Client

Information

Goal ID: M-000000090

Meeting ID:

Client: Search Provider Contacts...

\* Start Date:

End Date:

\* Daily Routine:

\* Describe child's goal completion:

\* Child Outcome Area: --None--

Legacy System Goal:

\* What action will the child be doing?:

Cancel Save & New Save

The following table details the controls that are present on the New Goal: Client record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Goal ID	The system populates the field with the Goal ID.	System Generated
Meeting ID	The system populates the field with the Meeting ID.	Read-only

Client	Displays the clients/child's name.	System Generated
Priorities	Click the lookup icon to search and select the Family Resources Priorities and concerns record to attach.	Not Mandatory
Start Date	Click the calendar icon and make date selection.	Mandatory
Mastery Date	Click the calendar icon and make date selection.	Not Mandatory
End Date	Click the calendar icon and make date selection.	Not Mandatory
What action will this child be doing?	Click in the textbox and enter information.	Mandatory
Daily Routine	Click in the textbox and enter information.	Mandatory
Describe child's goal completion	Click in the textbox and enter information.	Mandatory
Child Outcome Area	Click the dropdown and make a selection.	Mandatory
Legacy System Goal	The goal from the Legacy CDS application is displayed if applicable.	System Generated
User Action	Description	
Cancel	Click the cancel button to leave the page and not save any information.	
Save & New	Click the save & new button to save the information and open a new window.	
Save	Click the save button to save the information and remain on the page.	

## 22.1.1.2 Controls & User Actions – New Objective: Family

The screenshot shows a web form titled "New Objective: Family". The form is organized into several sections. At the top, there's a header "New Objective: Family". Below it, the "Information" section contains fields for "Objective ID" (populated with "GOAL-000000169"), "Meeting", "Stop Date" (with a calendar icon), "Start Date" (with a calendar icon), "Mastery Date" (with a calendar icon), "How will parents know when it's done?" (with an information icon), "Mastery Indicator", "Outcome Area Most Associated with Goal" (a dropdown menu showing "--None--"), and "When will we practice this?" (with an information icon). The "When will we practice this?" section has two columns: "Available" (a list box with "Play time", "Meal and snack times", "Bath time", and "Bed time") and "Chosen" (an empty box). Below these are several "Legacy System" fields: "Legacy System Objective", "Legacy System Objective Status", "Legacy System Objective Trials", "Legacy System Objective Sessions", "Legacy System Objective Completion Date", "Legacy System Objective Progress", and "Legacy System Objective Times". At the bottom, there are three buttons: "Cancel", "Save & New", and "Save".

The following table details the controls that are present on the New Objective: Family (Related Link). Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Objective ID	The system populates the field with the Goal ID.	System Generated
Goal	The system populates the field with the Meeting ID.	Read-only
Meeting	Displays the clients/child's name.	System Generated
Stop Date	Click the calendar icon and make date selection.	Not Mandatory
Start Date	Click the calendar icon and make date selection.	Mandatory
Mastery Date	Click the calendar icon and make date selection.	Not Mandatory
How will parents know when it's done?	Click in the textbox and enter information.	Mandatory
Explain the caregiver role and routine	Click in the textbox and enter information.	Mandatory
Master Indicator	Click in the textbox and enter information.	Mandatory
Daily Routine	Click the dropdown menu and make a selection.	Mandatory
Outcome Area Most Associated with Goal	Click in the textbox and enter information.	Not Mandatory

Family Caregiver	Click in the textbox and enter information.	Mandatory
When will we practice this?	This is a multi-pick select list. Highlight the selection or selections from the available columns click the arrow to move to the chosen column.	Mandatory
Other Practice Explanation	Click in the textbox and enter information.	Not Mandatory
Legacy System Objective	The objective from the Legacy CDS application is displayed if applicable.	System Generated
Legacy System Objective Status	The objective status from the Legacy CDS application is displayed if applicable.	System Generated
Legacy System Objective Trials	The count of objective trials from the Legacy CDS application is displayed if applicable.	System Generated
Legacy System Objective Sessions	The objective sessions from the Legacy CDS application are displayed if applicable.	System Generated
Legacy System Objective Completion Date	The objective completion date from the Legacy CDS application is displayed if applicable.	System Generated
Legacy System Objective Progress	The objective progress from the Legacy CDS application is displayed if applicable.	System Generated
Legacy System Objective Times	The objective times from the Legacy CDS application is displayed if applicable.	System Generated

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

### 22.1.1.3 Controls & User Actions – New Goal: Family

New Goal: Family

Goal ID

\* Responsible family member

Search Client, Family and Other Contacts

Meeting ID

M-000000112

\* Start Date

\* Target Date

End Date

Completion Date

\* Required Resources

\* Family will continue with goal?

--None--

Cancel

Save & New

Save

The following table details the controls that are present on the New Goal: Family record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Goal ID	The system populates the field with the Goal ID.	System Generated
Meeting ID	The system populates the field with the Meeting ID.	Read-only
Responsible family member	Click the lookup icon to make selection from the Client, Family and Other Contacts list. (If you begin typing name a list will populate and selection can be made)	Mandatory
Description of family goal	Click in the textbox and enter information.	Mandatory
Start Date	Click the calendar icon and make date selection.	Mandatory
Target Date	Click the calendar icon and make date selection.	Not Mandatory
End Date	Click the calendar icon and make date selection.	Not Mandatory
Completion Date	Click the calendar icon and make date selection.	Not Mandatory
Required Resources	Click in the textbox and enter information.	Mandatory
Family will continue with the goal?	Click the dropdown menu and make selection.	Mandatory
Attendee Role	Displays the case file number the note is attached to.	Not Mandatory
User Action	Description	
Cancel	Click the cancel button to leave the page and not save any information.	
Save & New	Click the save & new button to save the information and open a new window.	
Save	Click the save button to save the information and remain on the page.	

## 23 Evaluations Requested

### 23.1 Overview

The Evaluations Requested related link displays all requested evaluation records for the client.

#### 23.1.1 Screenshot

The screenshot shows a web form titled "New Evaluations Requested". It is organized into two main sections: "Information" and "Assignment".

**Information Section:**

- Evaluation ID:** A text field containing "M-000000090".
- Client Name:** A search dropdown menu with the placeholder text "Search Provider Contacts..." and a magnifying glass icon.
- Meeting ID:** A text field containing "M-000000090" with a red 'x' icon for clearing the field.
- Evaluation and/or screening authorized:** A dropdown menu with "--None--" selected.
- Other Evaluation Description:** A text area for additional notes.
- Provider First Choice:** A search dropdown menu with the placeholder text "Search DDS Providers..." and a magnifying glass icon.
- Provider Second Choice:** A search dropdown menu with the placeholder text "Search DDS Providers..." and a magnifying glass icon.
- Funding Source:** A dropdown menu with "--None--" selected.
- Unit:** A text field.
- Legacy Record ID:** A text field.
- Start Date:** A date picker field.
- End Date:** A date picker field.

**Assignment Section:**

- Provider Admin:** A search dropdown menu with the placeholder text "Search Provider Contacts..." and a magnifying glass icon.
- Provider Clerical:** A search dropdown menu with the placeholder text "Search Provider Contacts..." and a magnifying glass icon.
- Provider Therapist:** A search dropdown menu with the placeholder text "Search Provider Contacts..." and a magnifying glass icon.

At the bottom of the form are three buttons: "Cancel", "Save & New", and "Save".

##### 23.1.1.1 Controls & User Actions

The following table details the controls that are present on the Evaluations Requested Related Link. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Information Section</b>		
Evaluation ID	The system populates the field with the Evaluation ID.	System Generated
Client	Displays the clients/child's name.	System Generated
Meeting ID	The system populates the field with the Meeting ID.	Read-only

Evaluation and /or screening authorized	Click the dropdown menu and make selection.	Mandatory
Other Evaluation Description	Click in the textbox and enter information.	Not Mandatory
Provider First Choice	Click the lookup icon to make selection from the Search First Connections Providers list. (If you begin typing name a list will populate and selection can be made)	Mandatory
Start Date	Click the calendar icon and make date selection.	Mandatory
Provider Second Choice	Click the lookup icon to make selection from the Search First Connections Providers list. (If you begin typing name a list will populate and selection can be made)	Mandatory
End Date	Click the calendar icon and make date selection.	Mandatory
Funding Source	Click the dropdown menu and make selection.	Mandatory
Units	Click in the textbox and enter information.	Mandatory
Legacy Record ID	The record ID converted from Legacy CDS application will display if applicable.	System Generated
<b>Assignment Section</b>		
Provider Admin	Click the lookup icon to make selection from the Client, Family and Other Contacts list. (If you begin typing name a list will populate and selection can be made)	Not Mandatory
Provider Clerical	Click the lookup icon to make selection from the Client, Family and Other Contacts list. (If you begin typing name a list will populate and selection can be made)	Not Mandatory
Provider Therapist	Click the lookup icon to make selection from the Client, Family and Other Contacts list. (If you begin typing name a list will populate and selection can be made)	Not Mandatory
<b>User Action</b>	<b>Description</b>	
Cancel	Click the cancel button to leave the page and not save any information.	
Save & New	Click the save & new button to save the information and open a new window.	
Save	Click the save button to save the information and remain on the page.	



## 24 Services

### 24.1 Overview

The Services Related Link displays the documented requested service information for the client.

#### 24.1.1 Screenshot

**New Service**

**Information**

Service ID  
Meeting   Client

\* Service Authorized   Other Service Description

**Provider Selection**

\* Provider First Choice    \* Provider Second Choice

\* Service Location   Other Service Location

\* Start Date    End Date

\* Units   \* Funding Source

Has Family identified other needs? ☐ Legacy Record ID

\* Frequency  Intensity

**Assignment**

Provider Admin    Provider Clerical

Provider Therapist

**Teaming**

Is Teaming necessary?   Frequency of additional team aid

Minutes per Teaming session  Number of times of team additional aid

**Justification for Teaming**

IFSP Team recommends additional aid   How do the circumstances justify aid?

How will increased assistance help?   How will this aid with daily activities?

How will this aid family with goals?   Frequency of additional aid

Minutes per team  Number of times

### 24.1.1.1 Controls & User Actions-Client

The following table details the controls that are present on the Services Related Link. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Information Section</b>		
Service ID	The system populates the field with the service ID.	System Generated
Meeting ID	The system populates the field with the Meeting ID.	Read-only
Client	Displays the clients/child's name.	System Generated
Service Authorized	Click the dropdown menu and make selection.	Mandatory
Other Service Authorized	Click in the textbox and enter information.	Not Mandatory
<b>Provider Selection Section</b>		
Provider First Choice	Click the lookup icon to make selection from the Search First Connections Providers list. (If you begin typing name a list will populate and selection can be made)	Mandatory
Provider Second Choice	Click the lookup icon to make selection from the Search First Connections Providers list. (If you begin typing name a list will populate and selection can be made)	Mandatory
Service Location	Click the dropdown menu and make selection.	Mandatory
Other Service Location	Click in the textbox and enter information.	Not Mandatory
Start Date	Click the calendar icon and make date selection.	Mandatory
End Date	Click the calendar icon and make date selection.	Not Mandatory
Units	Click in the textbox and enter information.	Mandatory
Funding Source	Click the dropdown menu and make selection.	Mandatory
Has Family identified other needs?	Click the checkbox if applicable.	Not Mandatory
Legacy Record ID	The record ID converted from Legacy CDS application will display if applicable.	System Generated
Frequency	Click the dropdown menu and make selection.	Mandatory
Intensity	Click in the textbox and enter information.	Not Mandatory

<b>Assignment Section</b>		
Provider Admin	Click the lookup icon to make selection from the Client, Family and Other Contacts list. (If you begin typing name a list will populate and selection can be made)	Not Mandatory
Provider Clerical	Click the lookup icon to make selection from the Client, Family and Other Contacts list. (If you begin typing name a list will populate and selection can be made)	Not Mandatory
Provider Therapist	Click the lookup icon to make selection from the Client, Family and Other Contacts list. (If you begin typing name a list will populate and selection can be made)	Not Mandatory
<b>Teaming</b>		
Is Teaming necessary?	Click the dropdown menu and make selection.	Not Mandatory
Frequency of additional team aid	Click the dropdown menu and make selection.	Not Mandatory
Minutes per Consulting Session	Click in the textbox and enter information.	Not Mandatory
Number of times of team additional aid	Click in the textbox and enter information.	Not Mandatory
<b>Justification for Teaming</b>		
IFSP Team recommends additional aid	Click the dropdown menu and make selection.	Not Mandatory
How do the circumstances justify aid?	Click in the textbox and enter information.	Not Mandatory
How will increased assistance help?	Click in the textbox and enter information.	Not Mandatory
How will this aid with daily activities?	Click in the textbox and enter information.	Not Mandatory
How will this aid family with goals?	Click in the textbox and enter information.	Not Mandatory
Frequency of additional aid	Click the dropdown menu and make selection.	Not Mandatory
Minutes per team session	Click in the textbox and enter information.	Not Mandatory
Number of times of additional aid	Click in the textbox and enter information.	Not Mandatory

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

## 25 Consent and Signatures

### 25.1 Overview

The Consent and Signatures related link displays all consent and signature records for the service coordinator and the parent/legal guardian. On the Meeting Setup and Outcomes display page, in the action buttons section, there is a button to Generate Consent and Signatures. This will display the Consent and Signatures page.

#### 25.1.1 Screenshot

First Connections | Home | Referrals | Case Files | First Connections Providers | \* Client, Family and Other C... | X

Meeting Setup and Outcome  
M-000000114

Related List Quick Links  
Meeting Attendees (1) | Evaluations Requested (0) | **Consent and Signatures (0)** | Notes & Attachments (0) | Meeting Setup and Outcome History (3) | Notes (0)

**Details**

Meeting ID	M-000000114	Record Type	Family Engagement
Client	Vickie R Davis	Meeting Delivery Type	Teleconference
Scheduled Meeting Date	9/21/2022	Location of Meeting	
Scheduled Meeting Time	8:00:00 AM	County where provider is-its caregiver	Benton
Same as Scheduled	<input checked="" type="checkbox"/>	Meeting Delayed	
Actual Meeting Date	9/21/2022	Delayed Reason	
Actual Meeting Time	8:00:00 AM	Other Delay Explanation	
Decline Services		Meeting Outcome	Required
Decline Reason		Is Meeting Completed	<input type="checkbox"/>
Case File ID	CF-0000000087		
Legacy Record ID			
<b>System Information</b>			
Created By	Samantha Davis - DDS SC, 9/21/2022, 11:32 AM		Last Modified By
			Samantha Davis - DDS SC, 9/21/2022, 4:18 PM

**Meeting Attendees (1)**  
AA-00000108  
Attendee Name: Delamaria Davis  
Attendee Role: Family member  
View All

**Evaluations Requested (0)**

**Consent and Signatures (0)**

**Notes & Attachments (0)**  
Upload Files  
Or drop files

**Meeting Setup and Outcome History (3+)**  
Date: 9/21/2022, 4:18 PM  
Field: Parent Full Name  
User: Samantha Davis - DDS SC  
Original Value:  
New Value:  
Date: 9/21/2022, 4:18 PM  
Field: Primary Parent/Guardian  
User: Samantha Davis - DDS SC  
Original Value:  
New Value:  
Date: 9/21/2022, 4:17 PM

First Connections | Home | Referrals | Case Files | Certifications | DDS Providers | SPY Budgets | Corrective Action Plans | CAP Sustaining Compliance | Transitions | \* M-000000079 | X | \* Tommy Mann | X | \* M-000000001 | X | \* More | X

Consent and Signatures  
CONSENT-000000090

**Details**

Consent ID	CONSENT-000000090	Meeting	M-000000114
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**Parent Rights**

Parent Rights Legal Disclaimer  
I understand that I have the right to notice and consent in my native language before any personally identifiable information about my child is released or obtained. I understand that I can revoke this authorization at any time. I also understand that I may examine any and all records pertaining to my child at any time. I am authorizing Developmental Disabilities Services and the First Connections Program to obtain from and release information to: (list of providers as indicated on the 4000).

I have been given a copy of Parents' Rights under IDEA Part C governing early intervention to be provided through First Connections / DDS-Children's Services. I have had a chance to ask questions about my child's and family's rights and how my PHI (personal health information) will be used.

Parent Rights Attendee Consent  
Attendee Initials

**Participation Agreement**

Participation Agreement Legal Disclaimer  
I understand that early intervention will be provided to my family, without delay, without regard to public (Medicaid) or private health insurance coverage status during the time frame of the IFSP. If a service level increase is required during the duration of the IFSP, a new consent authorization form must be signed. Services to be provided are documented in the child's IFSP. Day Habilitation is not an Early Intervention service and is not covered under this agreement. Additional information regarding No-cost Protections for families participating in the First Connections program can be found on the back of this document.

I give my consent. I give my consent for First Connections providers to submit claims to Medicaid for covered early intervention services. I authorize Medicaid to make these payments to the First Connections provider. I authorize the release of any information from the First Connections provider to Medicaid as necessary to request payment of Medicaid benefits. I understand that I may revoke this permission at any time by notifying my First Connections Service Coordinator.

Participation Agreement Attendee Consent  
Attendee Initials

**Medicaid Insurance Authorization**

Insurance Legal Disclaimer  
In general, Arkansas First Connections has established policies to ensure that appropriate early intervention services will be provided to families of eligible infants or toddlers at no cost. Since services appropriate to meet functional child and family outcomes (goals) will be provided to an eligible infant or toddler and to his/her family at no cost to the parents, First Connections does not make use of sliding fee scales or determinations of ability/inability to pay. Therefore, there shall not be an instance where an eligible infant/toddler's parent will either be denied a service or service delayed based on a lack of consent or an inability to pay. Under no circumstance will a fee be imposed for non-disclosure of financial information or a parent charged disproportionately more than other parents.

**Notes & Attachments (0)**  
Upload Files  
Or drop files

### 25.1.1.1 Controls & User Actions-Client

The following table details the controls that are present on the Consent and Signatures Related Link. Each control includes a description and control type. Each user action includes a description.

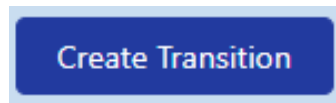
Controls	Description	Control Type
Parent Rights Attendee Consent	Click the dropdown menu and make selection.	Mandatory
Participation Agreement Attendee Consent	Click the dropdown menu and make selection.	Mandatory
Insurance Attendee Consent	Click the dropdown menu and make selection.	Mandatory
Tele Intervention Attendee Consent	Click the dropdown menu and make selection.	Mandatory

Evaluation Attendee Consent	Click the dropdown menu and make selection.	Mandatory
DHS4000 Attendee Consent	Click the dropdown menu and make selection. Also	Mandatory
Provider Names (1 and 2 Choice)	Click in the textbox and enter information.	Mandatory
Primary Care Physician Name	Click in the textbox and enter information.	Mandatory
Client Contact Name (All)	Click in the textbox and enter information.	Mandatory
Service Referral (Name of contact if the client was referred to an external service)	Click in the textbox and enter information.	Mandatory
Ongoing Service Coordinator	Click in the textbox and enter information.	
Change Coordinator Attendee Consent	Click the dropdown menu and make selection.	Mandatory
PUB408 Attendee Consent	Click the dropdown menu and make selection.	Mandatory
Attendee Initials	Click the dropdown menu and make selection.	Mandatory
User Action	Description	
Cancel	Click the cancel button to leave the page and not save any information.	
Save	Click the save button to save the information and remain on the page.	
Clear	Click the clear button to clear the information and remain on the page.	

## 26 Create Transition

### 26.1 Overview

The Create Transition button initiates the process of completing a transition plan record for the client.



#### 26.1.1 Screenshot

A screenshot of a web form titled "Create Transition". The form has a light gray header bar with the title. Below the header is a section titled "Information" in a darker gray bar. The form contains several fields: "Case File ID" with a green icon and value "CF-0000000068"; "Meeting" with a red icon and value "M-000000100"; "Transition Step" with an information icon and an empty text box; "Responsible Party" with an information icon and an empty text box; "Is Completed" with an information icon and a dropdown menu showing "--None--"; and "Start Date" with an information icon and a date picker icon. At the bottom of the form are three buttons: "Cancel", "Save & New", and "Save".

##### 26.1.1.1 Controls & User Actions

The following table details the controls that are present on the Create Transition record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Case File ID	The system populates the field with the Case File ID number.	System Generated
Meeting	The system populates the field with the assigned Meeting ID number.	System Generated
Transition Step	Click in the textbox and enter information.	Mandatory
Responsible Party	Click the lookup icon to make selection from the Client, Family and Other Contacts list. (If you begin	Not Mandatory



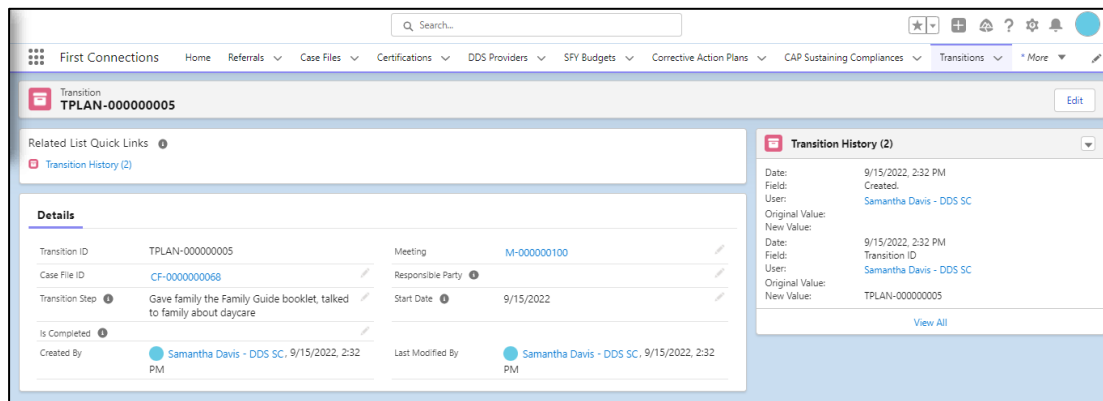
	typing name a list will populate and selection can be made)	
Is Completed	Click the dropdown menu and make selection.	Not Mandatory
Start Date	Click the calendar icon and make date selection.	Mandatory

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

### 26.1.2 Screenshot – Transition Related Links Details

The Transition record displays the documented transition plan details for the client.



#### 26.1.2.1 Controls & User Actions-Client

The following table details the controls that are present on the Transition Related Link record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Transition Plan ID	Displays the Transaction Plan ID number.	Read-only
Meeting	Displays the Meeting ID number.	Read-only
Case File ID	Display the Case File ID number.	Read-only
Transition Step	Displays the detailed information entered.	Editable
Responsible Party	Displays the Client, Family and Other Contacts name of person selected.	Editable
Is Completed	Displays the information selected from dropdown menu.	Editable
Start Date	Displays the start date.	Editable
Created By	Displays who created the record.	System Generated

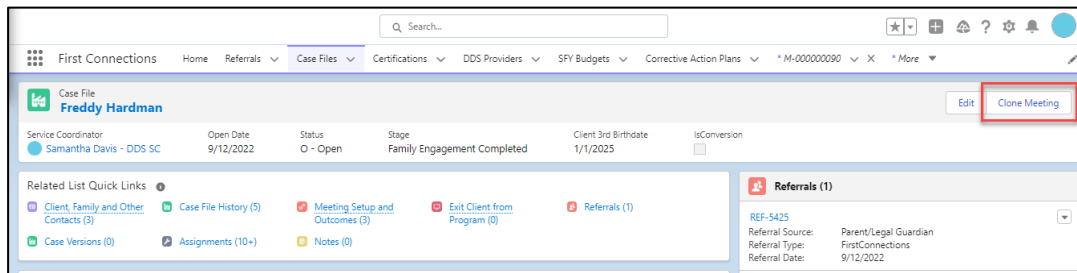
Last Modified By	Displays who last modified the record.	System Generated
User Action	Description	
Edit	Click the edit button or edit pencil to update or change record.	

## 27 Clone Meeting

### 27.1 Overview

The Clone Meeting Action Button provides a quick way for the user to duplicate a meeting without having to document certain meeting information.

#### 27.1.1 Screenshot



From the pop-up window, click the radio button next to the meeting record type and click "Clone."

Meeting to be Cloned

To proceed with cloning the meeting, click the Clone button.

☐

**M-000000100**  
Record Type: Transition  
Scheduled Date: 9/15/2022  
Scheduled Time: 1:00 PM

☒

**M-000000090**  
Record Type: IFSP  
Scheduled Date: 9/15/2022  
Scheduled Time: 10:00 AM

Cancel

Clone

#### 27.1.1.1 Controls & User Actions

The following table details the controls that are present on the Clone Meeting record. Each control includes a description and control type. Each user action includes a description.

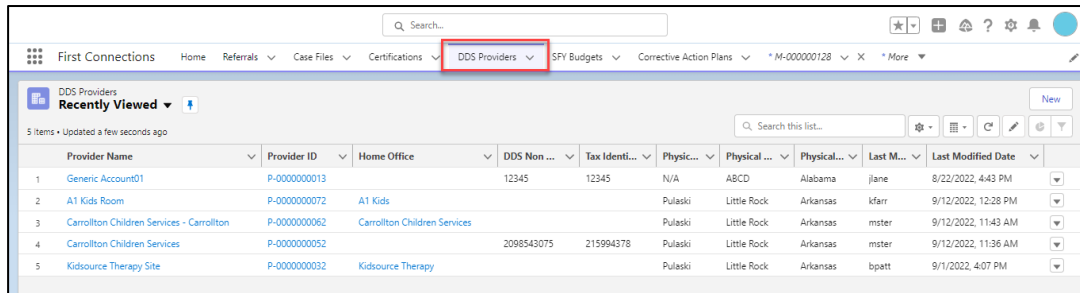
User Actions	Description
Cancel	Click the cancel button to leave the page and not save any information.
Clone	Click the clone button to duplicate the record type.

## 28 DDS Providers

### 28.1 Overview

The DDS Providers page can be accessed by clicking the DDS Providers tab in the Top Navigation Bar. A list of all DDS Providers can be found on this page. The user is also able to navigate to individual provider records via the DDS Providers List View Page.


#### 28.1.1 Screenshot




##### 28.1.1.1 Controls & User Actions

The following table details the controls that are present on the DDS Providers List View page. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Edit List View	Dropdown list that displays several options the user can select to modify the view provider information selected.	Always enabled
New	Opens a pop-up box where users can create a brand-new provider record.	Always enabled
Provider Table	Displays provider records and the corresponding provider information.	Always enabled

User Action	Description
Navigation	Navigate to the Referrals Page by clicking on the Referrals tab in the global menu.
Select List View	Click the  (to the right of 'Recently Viewed' on the screenshot) to open a dropdown list with the following options: <ul style="list-style-type: none"><li>• All First Connections Providers</li><li>• All Provider Sites</li><li>• My DDS Providers</li><li>• Recently Viewed</li><li>• Recently Viewed DDS Providers</li></ul>

Select one of these options to display the corresponding referrals in the Referrals Table. Use the  button to make the selected view your default view.

New	Click the “New” button to open a blank form to create a new provider record.
Provider Table	Click the Provider Name or Provider ID Number to navigate to the corresponding Provider Details page.

### 28.1.2 Screenshot

From the New DDS Provider pop-up window, select the radio button next to the provider record and click “Next.”

### 28.1.3 Screenshot – Provider

#### 28.1.3.1 Controls & User Actions

The following table details the controls that are present on the DDS Providers: Provider record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>DDS Provider Information</b>		
Provider ID	The system will populate this field when the record is saved.	System-Generated
Provider Name	Click in the look-up field to enter details.	Mandatory
DDS Non Medicaid Part C Number	Click in the textbox to enter details.	Mandatory
Medicaid DRS Number	Click in the textbox to enter details.	Not Mandatory
Tax Identification Number	Click in the textbox to enter details.	Mandatory
Provider Type	Click the drop-down menu to make a selection.	Not Mandatory
<b>Provider Status and Standing</b>		
Status	Click the drop-down menu to make a selection.	Mandatory
Standing	Click the drop-down menu to make a selection.	Mandatory
Reason	Click in the text area to enter details.	Not Mandatory
<b>Types of Care Provided</b>		
Care Provided	Make selection from the multi-select list.	Mandatory
Other Care Provided	Client in the textbox field to enter details.	Not Mandatory
Community Care Provided Details	Make selection from the multi-select list.	Not Mandatory
<b>Provider Contacts</b>		
Executive Dir/Owner	Click in the look-up field to enter details.	
Primary Contact	Click in the look-up field to enter details.	
<b>Physical Address Information</b>		
Physical Address 1	Click in the text box to enter physical address.	Mandatory
Physical Address 2	Click in the text box to enter addition physical address details.	Not Mandatory
Physical Address City	Click in the text box to enter City.	Mandatory
Physical Address State	Click the drop-down to select State.	Mandatory

Physical Address County	Click in the text box to enter Zip Code	Mandatory
Physical Address Zip Code	Click the drop-down to make County selection.	Mandatory
<b>Mailing Address Information</b>		
Same as Physical Address	Click the checkbox if the mailing address is the same as the physical address.	Not Mandatory
Mailing Address 1	Click in the text box to enter mailing address.	Not Mandatory
Mailing Address 2	Click in the text box to enter additional mailing address details.	Not Mandatory
Mailing Address City	Click in the text box to enter City.	Not Mandatory
Mailing Address State	Click the drop-down to select State.	Not Mandatory
Mailing Address Zip Code	Click in the text box to enter Zip Code.	Not Mandatory
<b>System Information</b>		
Legacy Record ID	Displays if record is converted from legacy system.	System- Generated
Home Office	Click the lookup icon to make a selection.	Not Mandatory
<b>User Action</b>		
Cancel	Click the cancel button to leave the page and not save any information.	
Save & New	Click the save & new button to save the information and open a new window.	
Save	Click the save button to save the information and remain on the page.	

## 28.1.4 Screenshot

### 28.1.4.1 Controls & User Actions

The following table details the controls that are present on the DDS Providers: Provider Site record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>DDS Provider Information</b>		
Provider ID	The system will populate this field when the record is saved.	System-Generated
Provider Name	Click in the look-up field to enter details.	Mandatory
Percentage of Clients without Disabilities	Client in the textbox field to enter details.	Not Mandatory
Home Office	Click in the look-up field to enter details.	Mandatory
<b>Site Status and Standing</b>		
Site Executive Dir/Owner	Click in the look-up field to enter details.	Not Mandatory
Site Primary Contact	Click in the look-up field to enter details.	Not Mandatory
<b>Physical Address Information</b>		
Physical Addr Same as Prvdr Physical Addr	Click the checkbox if applicable.	Not Mandatory



Physical Address 1	Click in the text box to enter physical address.	Mandatory
Physical Address 2	Click in the text box to enter addition physical address details.	Not Mandatory
Physical Address City	Click in the text box to enter City.	Mandatory
Physical Address State	Click the drop-down to select State.	Mandatory
Physical Address County	Click in the text box to enter Zip Code	Mandatory
Physical Address Zip Code	Click the drop-down to make County selection.	Mandatory

### **Mailing Address Information**

Same as Physical Address	Click the checkbox if the mailing address is the same as the physical address.	Not Mandatory
Same as Provider Mailing address	Click the checkbox if the mailing address is the same as the provider mailing address.	Not Mandatory
Mailing Address 1	Click in the text box to enter mailing address.	Not Mandatory
Mailing Address 2	Click in the text box to enter additional mailing address details.	Not Mandatory
Mailing Address City	Click in the text box to enter the City.	Not Mandatory
Mailing Address State	Click the drop-down to select the State.	Not Mandatory
Mailing Address Zip Code	Click in the text box to enter the Zip Code.	Not Mandatory

### **System Information**

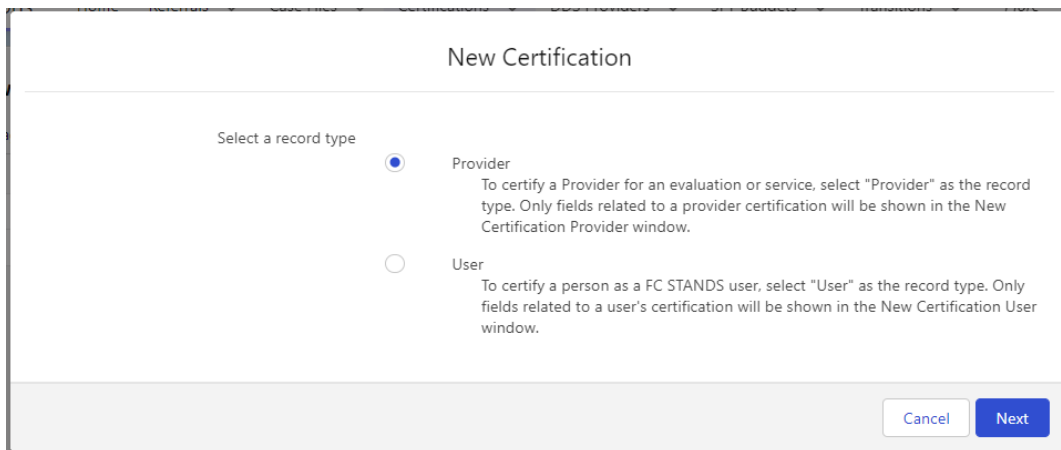
Legacy Record ID	Displays if record is converted from legacy system.	System-Generated
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User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.

## 29 Certifications

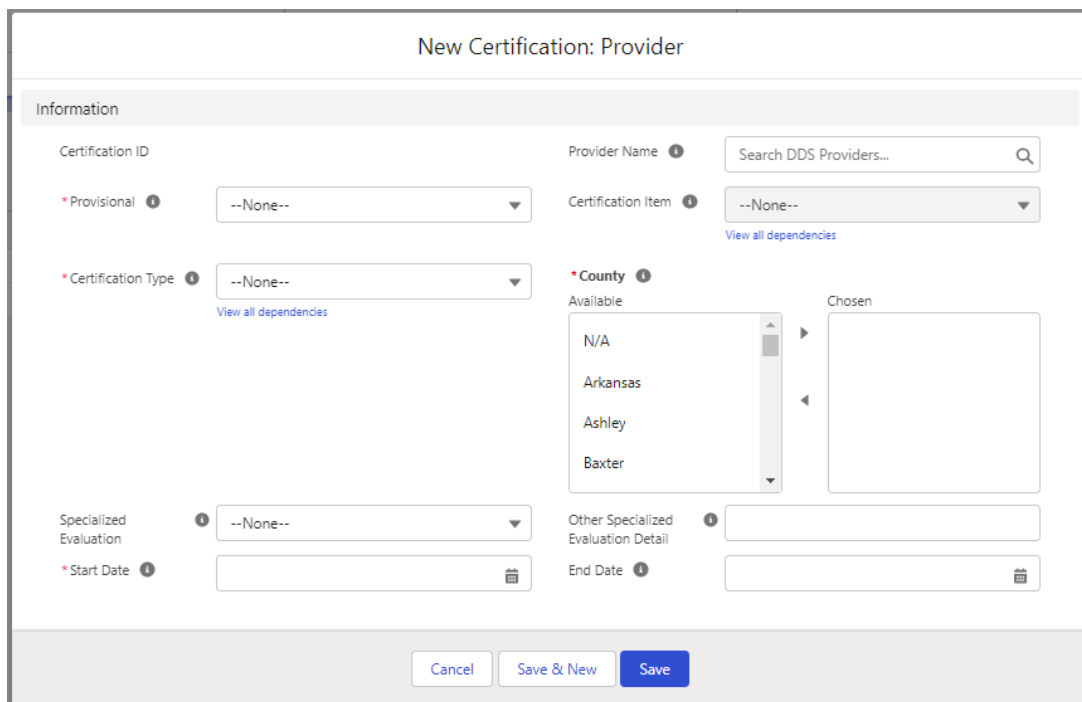
### 29.1 Overview

The Certification Related Link is used to document whether a provider or user is certified to provide evaluations and services they offer. A provider may be certified for several Evaluations and/or Services and can serve in a limited or unlimited number of counties in Arkansas.



The screenshot shows the 'New Certification' form. At the top, it says 'New Certification'. Below that, there is a section titled 'Select a record type'. There are two radio buttons: 'Provider' (selected) and 'User'. The 'Provider' option has a description: 'To certify a Provider for an evaluation or service, select "Provider" as the record type. Only fields related to a provider certification will be shown in the New Certification Provider window.' The 'User' option has a description: 'To certify a person as a FC STANDS user, select "User" as the record type. Only fields related to a user's certification will be shown in the New Certification User window.' At the bottom right, there are 'Cancel' and 'Next' buttons.

#### 29.1.1 Screenshot - Provider



The screenshot shows the 'New Certification: Provider' form. It has a title bar 'New Certification: Provider'. Below that is an 'Information' section. The form contains several fields: 'Certification ID' (text input), 'Provider Name' (text input with a search icon and 'Search DDS Providers...' placeholder), 'Provisional' (dropdown menu with '--None--'), 'Certification Item' (dropdown menu with '--None--' and a 'View all dependencies' link), 'Certification Type' (dropdown menu with '--None--' and a 'View all dependencies' link), 'County' (a list of counties: N/A, Arkansas, Ashley, Baxter, with an arrow pointing to a 'Chosen' box), 'Specialized Evaluation' (dropdown menu with '--None--'), 'Other Specialized Evaluation Detail' (text input), 'Start Date' (calendar icon), and 'End Date' (calendar icon). At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

#### 29.1.1.1 Controls & User Actions

The following table details the controls that are present on the New Certification: Provider record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Information</b>		
Certification ID	The system will populate this field when the record is saved.	System-Generated
Provider Name	Click in the look-up field to enter details.	Not Mandatory
Provisional	Click the dropdown menu and make a selection.	Mandatory
Certification Item	Click the dropdown menu and make a selection.	Not Mandatory
Certification Type	Click the dropdown menu and make a selection.	Mandatory
County	Make a selection from the multi-select picklist.	Mandatory
Specialized Evaluation	Click the dropdown menu and make a selection.	Not Mandatory
Other Specialized Evaluation Detail	Click in the textbox to enter details.	Conditionally Mandatory
Start Date	Click the calendar icon to make a date selection.	Mandatory
End Date	Click the calendar icon to make a date selection.	Not Mandatory
<b>User Action</b>		
Cancel	Click the cancel button to leave the page and not save any information.	
Save & New	Click the save & new button to save the information and open a new window.	
Save	Click the save button to save the information and remain on the page.	

New Certification

Select a record type

☐

Provider

To certify a Provider for an evaluation or service, select "Provider" as the record type. Only fields related to a provider certification will be shown in the New Certification Provider window.

☒

User

To certify a person as a FC STANDS user, select "User" as the record type. Only fields related to a user's certification will be shown in the New Certification User window.

Cancel

Next

## 29.1.2 Screenshot – User

### 29.1.2.1 Controls & User Actions

The following table details the controls that are present on the DDS Providers: Provider Site record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
Information	The system will populate this field when the record is saved.	System-Generated
User Name	Click in the look-up field to enter details.	Mandatory
Certification Type	Click the dropdown menu and make a selection.	Mandatory
Certification Required	Click the dropdown menu and make a selection.	Mandatory
Certification Number	Click in the textbox to enter details.	Not Mandatory
Certification Start Date	Click the calendar icon to make a date selection.	Mandatory
Certification End Date	Click the calendar icon to make a date selection.	Not Mandatory
User Action	Description	
Cancel	Click the cancel button to leave the page and not save any information.	
Save & New	Click the save & new button to save the information and open a new window.	
Save	Click the save button to save the information and remain on the page.	

## 30 Evaluation Report

### 30.1 Overview

The Evaluation Report Action Button allows the user to record session and services delivered by provider therapists for a client.

Create Evaluation Report

#### 30.1.1 Screenshot

The screenshot shows a web form titled "Create Evaluation Report". The form is organized into a grid-like structure. At the top, there's a header "Create Evaluation Report". Below it, a section titled "Information" contains several input fields. The first row has two fields: "Meeting" (with a red icon and value "M-000000090") and "Client Name" (with a blue icon and value "Freddy Hardman"). The second row has "Evaluation ID" (with a blue icon and value "EVAL-000000043") and "Evaluated By" (with a blue icon and a search bar labeled "Search People..."). The third row has "Evaluation Description" (with a blue icon and an empty text area) and "Evaluation Date" (with a blue icon and a date picker). The fourth row has "Name of Evaluation Tool" (with a blue icon and an empty text area) and "Social History" (with a blue icon and an empty text area). At the bottom of the form, there are three buttons: "Cancel", "Save & New", and "Save".

#### 30.1.1.1 Controls & User Actions

The following table details the controls that are present on the Evaluation Report record. Each control includes a description and control type. Each user action includes a description.

Controls	Description	Control Type
<b>Information</b>		
Meeting	Populates with Meeting ID.	System-Generated
Client Name	Populates with name of client.	System-Generated
Evaluation ID	Populates with Evaluation ID.	System-Generated

Evaluated By	Click in the look-up field to enter details.	Not Mandatory
Evaluation Description	Click in the text area to enter details.	Not Mandatory
Evaluation Date	Click the calendar icon to make a date selection.	Mandatory
Name of Evaluation Tool	Click in the textbox to enter details.	Mandatory
Social History	Click in the text area to enter details.	Mandatory
Strengths	Click in the text area to enter details.	Mandatory
Needs	Click in the text area to enter details.	Mandatory
<b>Developmental Therapy Evaluation</b>		
Physical (Fine Motor)	Click in the textbox to enter details.	Not Mandatory
Physical (Gross)	Click in the textbox to enter details.	Not Mandatory
Communication (Expressive)	Click in the textbox to enter details.	Not Mandatory
Communication (Receptive)	Click in the textbox to enter details.	Not Mandatory
Overall Physical Delay	Click in the textbox to enter details.	Conditionally Mandatory
Overall Communication Delay	Click in the textbox to enter details.	Conditionally Mandatory
Social/Emotional	Click in the textbox to enter details.	Not Mandatory
Adaptive	Click in the textbox to enter details.	Not Mandatory
Cognitive	Click in the textbox to enter details.	Not Mandatory
<b>Speech Therapy Evaluation</b>		
Communication (Expressive)(ST)	Click in the textbox to enter details.	Not Mandatory
Communication (Receptive)(ST)	Click in the textbox to enter details.	Not Mandatory
Overall Communication Delay	Click in the textbox to enter details.	Conditionally Mandatory
<b>Physical Therapy Evaluation</b>		
Stationary	Click in the textbox to enter details.	Not Mandatory
Object Manipulation	Click in the textbox to enter details.	Not Mandatory
Locomotion	Click in the textbox to enter details.	Not Mandatory

Gross Motor Quotation	Click in the textbox to enter details.	Not Mandatory
<b>Occupational Therapy Evaluation</b>		
Fine Motor	Click in the textbox to enter details.	Not Mandatory
Grasp	Click in the textbox to enter details.	Not Mandatory
Visual Reception	Click in the textbox to enter details.	Not Mandatory

User Action	Description
Cancel	Click the cancel button to leave the page and not save any information.
Save & New	Click the save & new button to save the information and open a new window.
Save	Click the save button to save the information and remain on the page.